



**EVIDENCE OF LEARNING:**  
UNDERSTANDING THE SUPPLIER ECOSYSTEM



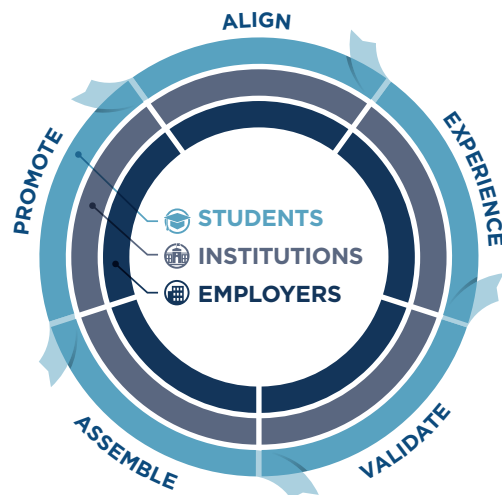
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## INTRODUCTION

In December 2014, we published *Evidence of Learning: The Case for an Integrated Competency Management System for Students, Higher Education, and Employers*, which encouraged colleges and universities to take a more proactive role in aligning the breadth of students' learning experiences with their personal and professional objectives. This publication introduced the concept of “evidence of learning” – defined as “the body of knowledge and skills, achieved through both formal and informal activities, that an individual accumulates and validates during their lifetime” – and presented the evidence of learning (EofL) framework, highlighting the interactions and alignment required among students, institutions, and employers as they move through the five EofL segments: Experience, Validate, Assemble, Promote, and Align. Our goal was – and is – to fuel reflection and discussion within the postsecondary community as to how institutions and their leaders can leverage the EofL framework to better meet the needs of students and employers and bridge the gaps between these two stakeholder groups.

### EofL STAKEHOLDER & SEGMENT FRAMEWORK



*Evidence of Learning: Understanding the Supplier Ecosystem* discusses the role of suppliers in this complex system, with a particular emphasis on seven markets composed of companies and organizations that are partnering with students, institutions, and employers in complementary and competitive ways. These markets and companies exert their own influence on the evolution of the EofL framework, and some of their objectives and approaches may be inconsistent with the needs and aspirations of colleges and universities vis-à-vis students and employers. The market mapping and analysis contained in this publication therefore furnishes postsecondary leaders with an additional perspective on the EofL ecosystem and the goals of companies that their institutions may be engaged with or evaluating.

This publication is composed of two primary sections and an index of suppliers. The initial section introduces the seven markets that support the EofL ecosystem and highlights their relative strength both within the five segments of the EofL framework and in reference to a broader set of dynamics impacting the path to EofL integration, both conceptually and technically. The second section, beginning on page 13, furnishes a snapshot of the individual markets, with expanded definitions and market commentary, an illustrative set of suppliers, and selected questions to provoke consideration of more granular alignment and integration issues. On page 38, we provide an extensive, but certainly not exhaustive, index of companies and organizations active across these seven markets.

## THE EVIDENCE OF LEARNING MARKET ECOSYSTEM

In the past several years, record amounts of investment capital have financed new companies serving – and targeting – US colleges and universities. These efforts often seek to enhance or shift established practices and processes, injecting innovative models and ideas into the existing postsecondary landscape. Ultimately, the growth and financial success of any one company is less important to colleges and universities than the debate and reflection these companies catalyze among institutional leaders, faculty, and other stakeholders. College and university leaders should incorporate consideration of these market innovations into their strategic planning efforts to ensure that their institutions keep pace.

The diversity of stakeholders and unmet needs across the EofL framework has, not surprisingly, spurred an expanding number of suppliers striving to bridge these gaps. Entrepreneurs, established companies and organizations, and community initiatives and associations offer disparate visions for how the EofL concept may evolve and come into practice more fully, creating a cacophony of options for those advocating a path forward.

Robust supplier activity is a valuable and encouraging dynamic, introducing models and solutions that might better meet stakeholder needs. While not all of these efforts will gain traction, they will catalyze changes in how stakeholders validate, capture, and present evidence of learning.

The proliferating efforts may also, however, stymie agreement on and development of a standard set of EofL platforms, services, and validation models. As a result, the market may face increasing fragmentation of the EofL concept as students, institutions, and employers – separately and together – adopt competing EofL models and solutions that individually fail to achieve sustainable levels of community engagement.

EofL solutions can be found in a number of existing and emergent markets. We highlight seven markets that underpin the EofL framework; each one comprises an ecosystem of companies and organizations that directly impact EofL stakeholders and the prospects for an integrated system.

### MARKETS COMPRISING THE EVIDENCE OF LEARNING ECOSYSTEM



- ACCREDITATION SERVICES
- ALTERNATIVE EDUCATION PROGRAMS
- ASSESSMENT SERVICES
- LEARNING AUTHENTICATION SERVICES
- PORTFOLIO PLATFORMS
- STUDENT SUPPORT & SUCCESS NETWORKS
- WORKFORCE ALIGNMENT PLATFORMS

Given the breadth and diversity of this landscape, a detailed review of each market extends beyond the scope of this particular publication. Rather, our goal is to provide postsecondary institutional leaders and other EofL champions with a market map that promotes better understanding of the value proposition of suppliers in these markets and how these suppliers may affect integration across the EofL framework. *Evidence of Learning: Understanding the Supplier Ecosystem* will help readers by:

- Defining the main markets influencing the EofL concept
- Evaluating market considerations vis-à-vis the EofL framework
- Highlighting notable dynamics and selected providers in each market
- Providing an index of active companies and organizations across the markets

The markets – and the suppliers composing them – reflect an evolving ecosystem. Since 2010, more than \$4 billion in private investment has been directed to postsecondary-oriented companies, and these investments have been augmented by grant funding from private and corporate foundations.

Our analysis, therefore, can only capture these markets – and their impact on the EofL ecosystem – at a particular moment in time. It is incumbent on institutional leaders and other EofL stakeholders to refresh this snapshot regularly in order to track changes in applicable market trajectories and company strategies. The market map and observations captured in *Evidence of Learning: Understanding the Supplier Ecosystem* are relevant to intra-institutional, inter-institutional, and organizational initiatives being undertaken across the EofL framework in effective partnership with suppliers of products and services.

The markets serving the EofL ecosystem consist of suppliers employing a variety of established and experimental business models to serve the needs of institutions, companies (i.e., employers), and individual students. Brief definitions and analysis for each market, including an assessment of the market’s intersection with the EofL framework, are provided below. More expansive market overviews, including a set of illustrative suppliers, begin on page 13.

## ACCREDITATION SERVICES

- Support processes for awarding accreditation and academic credit, as well as for reviewing compliance with academic, operating, and other regulatory requirements
- Represent a range of organizations providing regional, national, and specialized (or programmatic) accreditation to colleges and universities
- Enable eligibility for federal funding programs, including financial aid, that students may use to underwrite their education

Accreditation Services organizations are the least engaged in – or the least integrated into – the EofL framework and thus are the most threatened by the activities of companies and organizations in other markets. Unless they adapt their narrow focus and limited value proposition to allow for more effective engagement across markets and EofL stakeholder groups, they will stymie systemic reform. Among the organizations in the market, a subset of national and specialized accrediting bodies has been most responsive to this dynamic in seeking to align the needs and goals of students, institutions, and employers.

## ALTERNATIVE EDUCATION PROGRAMS

- Deliver instructional programs and learning experiences that may be positioned as comparable to traditional postsecondary coursework or vocational education but are generally not delivered by a traditional or accredited organization
- Provide programs and offerings that are generally not eligible for Title IV funding
- May provide credit based on evaluation by Accreditation Services providers

Much of the investor hype and excitement at the intersection of postsecondary education and workforce development across the past several years has been directed at non-degree, non-accredited programs that provide bridge opportunities for students. If companies in the Alternative Education Programs market achieve greater credibility in the Validate or Promote segments of the EofL framework, they will pose a real threat to traditional institutions. This competitive threat will initially impact continuing and professional education programs, before eroding degree-granting enrollments. For now, the viability of these companies' business models depends on alignment with specific employers and/or targeted industries that value the educational experience delivered to students.

## ASSESSMENT SERVICES

- Deliver academic and non-cognitive (e.g., motivation, self-discipline, determination) assessments across a broad spectrum of models
- Directly assess students' knowledge and experience garnered both within and outside traditional institutions to establish a baseline for mastery or competence
- **Instruments** suppliers deliver standardized tests, performance tasks, and other assessment tools
- **Evaluation** suppliers conduct analytically driven evaluations of students' experience and participation, drawn from a variety of data sources

The Assessment Services market directly measures individuals' proficiency, competency, or aptitude and comprises two distinct submarkets. At one end of the Assessment Services market are **Instruments** suppliers, which offer long-standing objective assessments (e.g., CLEP, DSST) that provide students with an opportunity to demonstrate content- and knowledge-based mastery in various disciplines. These more-traditional assessments are striving to remain relevant in an environment increasingly focused on demonstrating competency. At the other end of the market are big-data, predictive analytic evaluation tools and processes (e.g., Gild, Evolv, Smarterer) that sift through data on individuals and large cohort samples to identify and evaluate individual competencies. These **Evaluation** suppliers' solutions peer beyond standard academic metrics to discern optimal candidates and their true capabilities; to date, these solutions have tended to gain traction in industry-oriented and skills-based contexts. The Assessment Services market supports the Validate segment of the EofL framework by measuring individuals' readiness for further academic work or workforce participation.

## LEARNING AUTHENTICATION SERVICES

- Support processes for authenticating courses, experiences, or modules to enable the delivery of credit or validation of learning; predominantly target and support non-institutional experiences
- **Infrastructure** suppliers deliver frameworks, guides, or technologies that allow an organization or institution to develop, adopt, or share credentials or digital badges
- **Credentialing** suppliers deliver solutions that allow organizations or individuals to use informal learning (e.g., digital badges, MOOCs, learning modules) for promotion, recognition, or validation of their skills and experience

The Learning Authentication Services market represents an emergent category of suppliers whose solutions validate programmatic rigor and quality through the use of credentials and digital badges. Ideally, this market complements the Accreditation Services and Assessment Services markets. While still in their infancy relative to traditional accreditors, Learning Authentication Services suppliers have captured significant interest among organizations offering experience-based educational opportunities and are aggressively pursuing areas with limited use of traditional assessment services. As the **Infrastructure** submarket matures and gains credibility across the EofL stakeholder groups, it may emerge as the fulcrum of an integrated EofL ecosystem. The suppliers in the **Credentialing** submarket are most likely to challenge the established solutions in the Assessment Services market, introducing alternative models for measuring and validating student learning.

## PORTFOLIO PLATFORMS

- Enable curation, development, and publishing of individual students' portfolios of learning experiences and personal interests
- May capture both formal and informal events and align to specific verticals or communities
- Operate business models that target both institutional adoption and direct use by individuals
- **E-Portfolio** suppliers initially launch dedicated portfolio solutions that may later expand in scope and features to deliver more robust tools and learning resources for stakeholders
- **Enterprise** suppliers' solutions include learning management systems and other teaching and learning platforms that have incorporated portfolio tools as a component of the solution footprint

## WORKFORCE ALIGNMENT PLATFORMS

- Present job descriptions and educational pathways and align them with recommended competencies and learner objectives; may map workforce opportunities to academic programs

Suppliers in the Portfolio Platforms and Workforce Alignment Platforms markets possess a similar value proposition – supporting aggregation and promotion of experiences for individuals vis-à-vis institutions and employers – but toward different ends. Portfolio solutions tend to remain rooted in an academic context, with some notable exceptions (e.g., education and arts disciplines), while Workforce Alignment solutions are oriented



toward employment opportunities and discovery of prospective candidates. For institutions, the Portfolio Platforms suppliers are likely the logical candidates to help facilitate integration of the EofL framework, given their student-centered orientation and their ability to aggregate diverse forms of assessment and evaluation. However, for individual students, particularly adult learners, Workforce Alignment solutions that facilitate finding that first or next job after an educational experience will garner greater interest and engagement than those residing within a primarily institutional context.

## STUDENT SUPPORT & SUCCESS NETWORKS

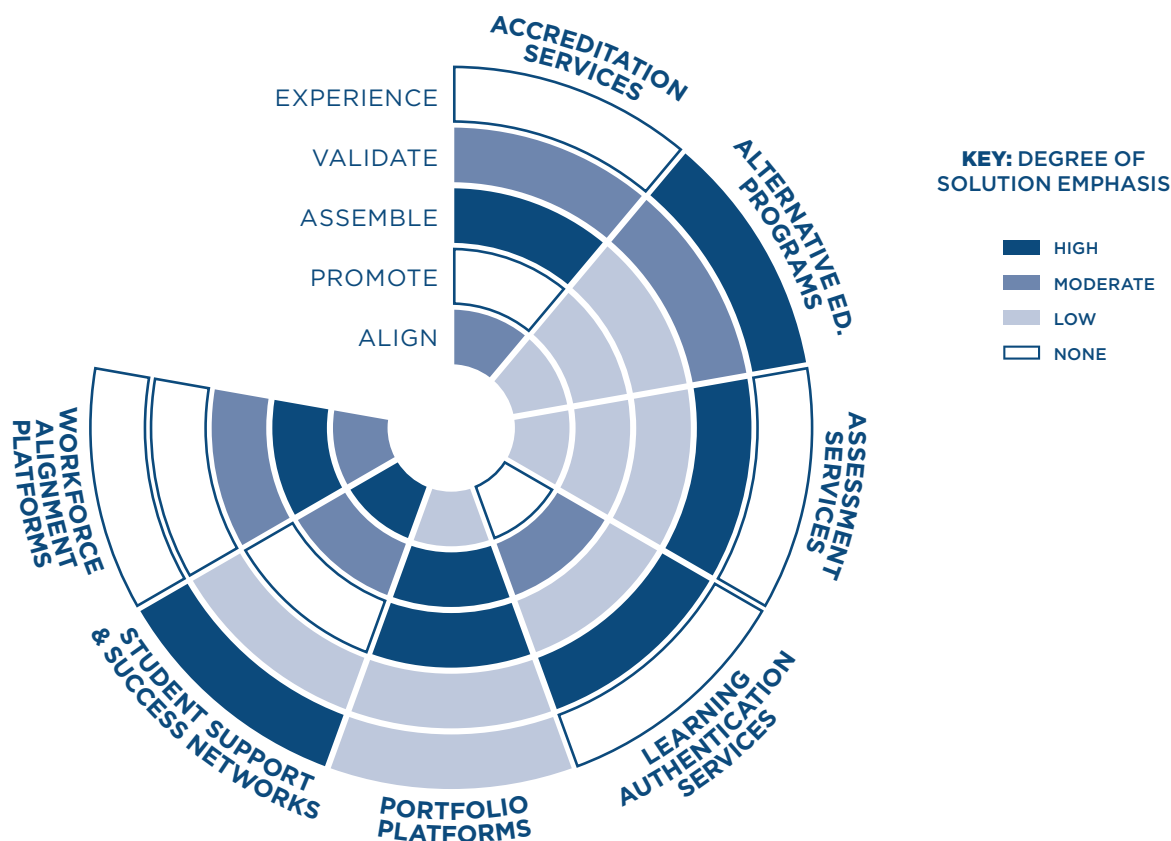
- Provide counseling or mentoring services to individuals, often leveraging analytics on social platforms to match mentors to students and job seekers
- Emphasis is on direct-to-student models, although some suppliers are leveraging institutional channels to reach and engage students

The Student Support & Success Networks market, similar to the Learning Authentication Services market, is in an early stage of maturation; its impact on the EofL framework today is based on potential, not practical reality. However, suppliers in this space are highlighting a path to more scalable models of student support and services that individuals may increasingly turn to as a substitute for those traditionally provided by colleges and universities. Institutional leaders' ability to graft these emergent online models onto their existing site-based infrastructure presents a promising pathway for re-energizing the services required to support and accelerate student success.

## MARKETS' IMPACT WITHIN THE EofL FRAMEWORK

The figure below maps the seven EofL markets' orientation toward and impact on the segments of the EofL framework. The color of the segments across each market reflects the extent to which market suppliers' solutions enable EofL stakeholders to perform segment activities, with the darkest color indicating the greatest alignment and impact. For example, Assessment Services suppliers are most highly focused on helping customers achieve their goals in the Validate segment, and have little or no effect on activities in the Experience segment.

## INTERSECTION OF EofL FRAMEWORK AND MARKETS



This assessment of the markets' relevance to specific framework segments provides context for the needs of stakeholders, the goals of reforms, and the potential value of solutions. This analysis highlights how well positioned market suppliers may be to influence, or even enable, systemic integration of the EofL framework, and can assist institutional leaders in determining from which markets their key EofL partners may emerge. Note that this assessment reflects a market-level view, and the capabilities and efforts of specific companies and organizations may vary from those identified at the segment level.

The relative lack of impact that individual solutions have across all five segments (Experience, Validate, Assemble, Promote, and Align) highlights the tall hurdle that suppliers face in regard to aligning and integrating these concepts and solutions. Moreover, when one overlays the diverse customer orientation of suppliers in these markets – i.e., students vs. institutions vs. employers – the challenges are magnified.

Postsecondary institutions, however, are actively grappling with the principles captured in the EofL framework to better support students and, ultimately, employers. As colleges and universities collectively spend hundreds of millions of dollars on solutions within and adjacent to the EofL ecosystem, they are in an advantageous position to push suppliers to improve integration across markets and solution categories.

A scan of these EofL markets reveals a number of macro dynamics that bear consideration toward a more integrated, learner-centric EofL ecosystem.

- **Variability in each market's stage of development.** The Accreditation Services market is composed of well-established organizations that are today often seen as impediments to more forward-looking changes across the postsecondary landscape. Conversely, many companies and organizations in the Learning Authentication Services market did not exist five years ago and are striving to drive change at a pace that colleges and universities cannot or will not accept. Portfolio platforms are not a new concept, and yet organizations in the Portfolio Platforms market have struggled across the past decade to achieve the type of broad-based adoption likely requisite for a more mature EofL environment.

This variability creates a set of organizational maturity, culture, and technology issues that will slow alignment across markets and participants. EofL advocates will pursue opportunities to identify and bridge these gaps.

- **Role of investments in stimulating new models.** Markets such as Alternative Education Programs, Learning Authentication Services, and Assessment Services are witnessing an influx of investment financing as new businesses ramp up to tackle perceived market opportunities. In many cases, these investments are underwriting companies that are putting pressure on existing postsecondary institutional models by creating alternative, non-credit, and non-accredited educational pathways. The postsecondary market has also seen dramatic growth in companies and organizations enabling badging and micro-credentialing, even as the credibility of these signals has had limited impact to date within formal education environments and the workforce.

This investment activity does not foreshadow business or model success, but it does highlight areas where existing market stakeholders – institutions, students, and employers – are not satisfied or well served by current suppliers. New entrants will effect change in these EofL markets, directly and indirectly. For colleges and universities, these innovations represent both opportunities and threats that bear tracking and engagement.

- **Limited levels of solution integration within and across markets.** The vision of an integrated EofL ecosystem is predicated on a reasonable degree of integration – particularly in the areas of learning outcomes, workflow process, and technology – for stakeholders within a market, prior to establishing more broad-based alignment across the EofL market map. For example, integration between portfolio platforms and the broader array of institutional learning and administrative technologies is not an insignificant challenge today. Similarly, ensuring that independent assessments align with existing institutional programs and convert to meaningful credit awards is a high priority for students, and the proliferation of badges and micro-credentials is another area of vibrant activity that is grappling with standards issues and is currently disconnected from most institutional credit policies.

These examples highlight first-order integration issues that suppliers and stakeholders must solve as a prerequisite to achieving a holistic EofL system. Postsecondary institutions, as a core customer and beneficiary of these efforts, can take a leadership role in articulating and advocating for a set of integration requirements that accelerate adoption and impact for students, employers, and institutions. As a first step, promoting, supporting, and developing technology standards – an oft-cited but often lightly resourced area – on behalf of the EofL stakeholder community is paramount. Leading this effort should help colleges and universities preserve the rigor and integrity of their academic programs while also accounting for the value of complementary and adjacent initiatives meeting student and employer needs.

- **High potential for market – and solution – convergence.** We anticipate that both institutions and suppliers will experience increased convergence of solutions in the coming years, as more innovative and/or non-traditional approaches to meeting EofL stakeholder needs collide with existing models and services. Today’s Learning Authentication Services suppliers are generally striving to establish credentialing models in areas of “non-consumption,” those areas that have not previously measured or tracked learning outcomes. As badges, micro-credentials, and other innovative forms of performance assessment and management emerge, they will ultimately need to be reconciled with Assessment Services suppliers’ more established, validated measures and approaches. While suppliers in these two markets have not intersected much to date, they should and they will. Moreover, we expect that more progressive organizations within the Accreditation Services ecosystem will accelerate this convergence by experimenting with and adopting solutions from the Learning Authentication Services market.

A similar dynamic exists between solutions in the Portfolio Platforms and Workforce Alignment Platforms markets. Suppliers are generally targeting different buyers – either institutions or companies – but are ultimately serving the same user, students and/or professionals. The features and functionality of solutions within these two markets vary widely, but they are both aiming to meet the needs of stakeholders in the Assembly and Promote segments of the EofL framework. What remains to be seen is whether market convergence will be driven by suppliers themselves, recognizing the opportunity to bridge the institutional and employer realms, or emerge based on more effective alignment of goals and objectives between institutions and employers.

A more fully integrated EofL framework depends on colleges and universities’ engagement with the supplier community across these markets. Customer dissatisfaction – in this case, that of students and employers – with their experiences and outcomes from colleges and universities is driving a disaggregation of the postsecondary experience, with innovative models and services emerging to meet these stakeholders’ needs. As the historic bridge between students and the workforce, postsecondary institutions must communicate how the tools and resources they adopt are evolving to support their stakeholders’ objectives; failing to do so will leave many institutions vulnerable as their “customers” pursue alternative pathways.

## EVIDENCE OF LEARNING MARKET PROFILES

The overviews of the EofL markets on the following pages ground college and university leaders and other postsecondary stakeholders in notable dynamics related to the EofL concept and integration issues. Each market profile provides context for suppliers delivering technologies and services to students, institutions, and employers and includes:

- A market definition
- Background on the market's evolution and selected solution attributes
- An illustrative set of market suppliers
- Selected questions for institutional stakeholders regarding:
  - EofL integration issues (i.e., learning outcomes, workflow process, technology)
  - Solution performance and implementation considerations

We have attempted to capture the state of the EofL markets at a point in time, recognizing that new investments and transactions; federal, state, and institutional policies; and progress toward interoperability standards and solution integration pathways will change the complexion of individual markets and the broader landscape. As such, the fluid and robust nature of the EofL supplier ecosystem requires college and university leaders to use this analysis as a springboard to more targeted investigation of options for institution-specific gaps and opportunities.

### READER'S NOTE

For each market, we have highlighted an **illustrative** sample of current suppliers, **not** a list of recommended providers. In no way should the inclusion of organizations in the market supplier tables or the supplier index beginning on page 38 be perceived as an endorsement of any single provider; our objective in including specific suppliers is to assist college and university leaders who are seeking to accelerate efforts to understand the landscape. Institutional priorities vary, and the supplier tables are intended to furnish context for organizations exploring potential partners relative to their needs.

### HOW CAN ACCREDITATION SERVICES SUPPORT EofL INTEGRATION?

#### Technology integration

- Identify auditing requirements for data that institutions must report on to accredit prior learning

#### Workflow process integration

- Establish processes for transitions to competency-based learning or recognition of prior-learning models

#### Outcomes alignment/integration

- Provide frameworks for employers and institutions to collaborate on credit-earning programs, internships, and other experiences

## DEFINITION

The Accreditation Services market differs from others in the Evidence of Learning ecosystem because it is composed of organizations that are primarily responsible for designing, developing, and advocating for institutional policies and guidelines on academics and operations, rather than offering products and solutions such as software, content, or assessments. While not necessarily delivering “solutions,” organizations in this market are of vital importance to any institution seeking to participate in the EofL ecosystem.

The primary objective of Accreditation Services organizations is to ensure accreditation by developing evaluation criteria, facilitating the review of institutions and their academic programs, and evaluating whether the criteria are met. This market comprises three types of accreditors: regional, national, and specialized (or programmatic). The first two types are most simply distinguished by geographic scope; regional accreditors, as implied, conduct their activities within a specified set of states, whereas national accreditors engage with colleges and universities across the United States. Specialized, or programmatic, accreditors concentrate efforts on reviews of single programs within a broader institutional context, and they primarily operate nationally.

## MARKET OVERVIEW

While accrediting organizations have existed since the late 1800s, the providers in the Accreditation Services market assumed a more prominent role in the 1950s as the US government began investing more directly in supporting students’ postsecondary education. In many ways, the core roles of accrediting organizations have remained fairly constant: first, as a seal of approval to prospective and current students regarding institutional and programmatic quality (i.e., “accreditation”), and second, as an eligibility trigger for the provision of federal funding to institutions and financial aid to students.

Not surprisingly, as the bulwark for institutional and programmatic quality, Accreditation Services organizations are inherently more cautious in the face of new system dynamics, of which the EofL framework is certainly one. Within the market, national and some specialized accrediting organizations have generally demonstrated a greater degree of receptivity to innovative trends and models that are driving changes in postsecondary instruction. These organizations are more likely to introduce policies and initiatives that may positively impact EofL framework and stakeholder alignment issues. These efforts may include taking a more expansive view of how students earn and accrue academic credit for experiences based outside a classroom context, while simultaneously ensuring compliance with core academic, skills-based, and other regulatory requirements.




Ultimately, organizations within the Accreditation Services market have a critical role to play in the realization of an integrated EofL system. As stewards of academic quality by and for institutions, they – with the power of policy and practice – have the unilateral ability to align the needs of students and employers across the EofL framework. Should they resist taking up this opportunity, other forces in other markets will step up, in different ways, across the various institutional segments in the postsecondary education community.
















## ILLUSTRATIVE SOLUTIONS

Organizations within the Accreditation Services market perform one or more of the following functions:










- Verify that an institution or program meets a set of articulated standards
- Build trust among prospective students that institutions offer credible programs and are financially viable
- Determine institutional eligibility for federal funding and the issuance of financial aid to students
- Engage administrators, faculty, and staff in institutional planning and evaluation efforts

The table below offers an illustrative sample of seven agencies and organizations within the Accreditation Services market. A complete list can be found at the US Department of Education [website](#).

 STUDENT  INSTITUTIONS  EMPLOYERS  FOUNDATIONS				
COMPANY	INFO	OVERVIEW	PRIMARY AUDIENCE	PRIMARY BUYER
Accrediting Council for Continuing Education & Training	<a href="#">Website</a>	An organization that facilitates accreditation nationally for higher education institutions delivering continuing education and vocational programs that result in certificates or occupational associate degrees.	 	
Accrediting Council for Independent Colleges & Schools	<a href="#">Website</a>	An organization that provides accreditation services nationally to private postsecondary institutions offering programs that confer certificates through master's degrees in programs with a professional, technical, or occupational orientation.	 	

COMPANY	INFO	OVERVIEW	PRIMARY AUDIENCE	PRIMARY BUYER
<b>Council for the Accreditation of Educator Preparation</b>	<a href="#">Website</a>	A specialized accreditor of more than 900 programs in the US that deliver baccalaureate and graduate degree programs for teacher preparation and other professional roles in K-12 schools; formed through the July 2013 merger of two previous accrediting bodies.	 	
<b>Distance Education Accrediting Commission</b>	<a href="#">Website</a>	A national accreditor serving postsecondary institutions in the US offering degree or non-degree programs delivered primarily by distance or correspondence methods.	 	
<b>Higher Learning Commission</b>	<a href="#">Website</a>	A regional accreditor serving degree-granting postsecondary institutions located in the North Central region, comprising 19 states ranging from Arizona in the Southwest to Ohio in the eastern Midwest.	 	
<b>National Association of Schools of Art &amp; Design Commission on Accreditation</b>	<a href="#">Website</a>	A specialized accreditor that provides services to institutions offering art and design-related programs in the US; accreditation extends to both degree and non-degree programs.	 	
<b>Southern Association of Colleges &amp; Schools Commission on Colleges</b>	<a href="#">Website</a>	A regional accreditor that works with degree-granting postsecondary institutions in the Southern region, comprising 11 states ranging from Texas to Virginia.	 	

## SELECTED QUESTIONS FOR INSTITUTIONAL CONSIDERATION

-  Related to technology integration
-  Related to workflow process integration
-  Related to outcomes alignment/integration
  - What are the organization’s guidelines regarding institutional policies for awarding credit for prior or experiential learning?  
  - To what degree does the organization interact with employers or professional associations?  
  - Does the organization have guidelines that call for reviewing technology-enabled personalized or adaptive instructional models differently than other programs?  



## MARKET:

# ALTERNATIVE EDUCATION PROGRAMS

### HOW CAN ALTERNATIVE EDUCATION PROGRAMS SUPPORT EoFL INTEGRATION?

#### Technology integration

- Provide reports on extracurricular, co-curricular, or experiential learning that flow into colleges and universities' systems of record

#### Workflow process integration

- Provide course delivery models that engage students — and that potentially compete with institutions

#### Outcomes alignment/integration

- Share employer-reviewed or employer-authored competencies with institutional programs
- Map non-institutional programs' competencies and outcomes to parallel institutional offerings

## DEFINITION

Providers in the Alternative Education Programs market deliver instructional programs to individuals; their offerings are positioned as a substitute for or an enhancement to traditional postsecondary coursework or vocational education. Today, these programs are not eligible for Title IV financial aid funding and generally do not furnish students with institutional credits. Most programs employ a direct-to-learner business model differentiated by affordability, flexibility, and/or workforce applicability as compared to most college and university programs.

## MARKET OVERVIEW

The Alternative Education Programs market has emerged in response to the failure of colleges and universities to account for student and employer needs. From the student perspective, the escalating cost of a postsecondary education and the emergence of “open” content and courses have prompted students to explore alternatives to an investment in institution-based courses and programs. For employers, the catalyst has been institutions' lack of responsiveness to industry needs; employers have therefore turned elsewhere and are working through industry associations and in partnership with selected providers to deliver competency-oriented programs that match workforce requirements better than the programs offered by colleges and universities.

Investor interest in businesses within the Alternative Education Programs market is strong. However, these providers will enhance their long-term viability and present a more considerable threat to institutions when they develop their own assessments or align with recognized ones. Pluralsight's acquisition of Smarterer in November 2014 is one illustration of this dynamic, and other examples will likely follow. Programs with effective assessment components can more easily support or partner with institutional programs, and they may also partner with employers in ways that could disintermediate institutions.

Other illustrative investments and transactions in this market:


















- **Lynda.com** raised \$186 million in January 2015, after having secured a \$103 million financing round in January 2013
- In the latter half of 2014, **Galvanize** raised nearly \$20 million, announced the launch of GalvanizeU and a partnership with the University of New Haven, and acquired Zipfian Academy, which provides 12-week programs in data science and engineering
- **Pluralsight**, which raised \$135 million in August 2014, has announced six transactions, including Smarterer, since 2013











## ILLUSTRATIVE SUPPLIERS

The Alternative Education Programs market includes a diversity of providers, ranging from IT-oriented bootcamp businesses to online-course libraries to ground-based accelerator hubs. Despite the variety of models being pursued, providers – and their solutions – possess one or more of the following attributes:










- Include content or courseware that individuals can employ as a substitute for traditional institutional courses
- Prioritize applied learning and non-academic experiences and topics
- Feature courseware that is endorsed or authored by employers
- Offer courses or programs at a low cost or at no cost to individuals

The following table highlights representative suppliers; note that this table is an illustrative sample and is not intended to be an endorsement or a comprehensive list of providers. In addition, the description of each organization may not capture the full breadth and depth of its capabilities and services. Institutional priorities vary, and the suppliers shown here are intended to furnish context for organizations exploring potential partners relative to their needs.

 STUDENT  INSTITUTIONS  EMPLOYERS  FOUNDATIONS				
COMPANY	INFO	OVERVIEW	PRIMARY AUDIENCE	PRIMARY BUYER
<b>Codecademy</b>	<a href="#">Website</a>	A free, online, interactive platform that offers instruction in coding.		
<b>CorpU</b>	<a href="#">Website</a>	A network of membership-based virtual learning communities that connect employees to experts in the field of talent management.	 	
<b>General Assembly</b>	<a href="#">Website</a>	A self-described educational institution offering site-based and online classes and programs in the areas of technology, business, and design.	 	 
<b>Koru</b>	<a href="#">Website</a>	A short-term program that provides recent college graduates with workforce skills orientation and professional development coaching.	 	 

COMPANY	INFO	OVERVIEW	PRIMARY AUDIENCE	PRIMARY BUYER
lynda.com	<a href="#">Website</a>	An online, video-based learning company delivering programs in business, software, technology, and creative skills.		
NovoEd	<a href="#">Website</a>	An open-course solution that partners with institutions to offer instruction in a wide range of subjects, while also facilitating student collaboration.		
Peer 2 Peer University	<a href="#">Website</a>	An open learning community that allows users to both build and take courses; also offers documentation of learning through badges.		
StraighterLine	<a href="#">Website</a>	A provider of low-cost online courses for transfer credit at select postsecondary institutions.		
Viridis Learning	<a href="#">Website</a>	An online workforce training and certification solution that also provides employer matching services to middle-skilled employees.		

## SELECTED QUESTIONS FOR INSTITUTIONAL CONSIDERATION

-  Related to technology integration
-  Related to workflow process integration
-  Related to outcomes alignment/integration
  - Does the provider have partnerships with colleges and universities? How are its solutions implemented in support of or in place of a course delivered by an institution?   
  - How does the provider track its solutions' impact on student attainment, retention, and placement?  
  - What types of assessments are incorporated into the solution? What are the competencies or standards with which these assessments are associated? 

### HOW CAN ASSESSMENT SERVICES SUPPORT EoFL INTEGRATION?

#### Technology integration

- Capture evidence of prior learning and allow other institutional systems to access that evidence

#### Workflow process integration

- Provide inputs to instructional pathways, retention, and placement efforts, among others

#### Outcomes alignment/integration

- Provide credit and personalized learning opportunities to students, based on their performance
- Connect prior learning to institutional competencies and existing courses

## DEFINITION

The Assessment Services market includes providers delivering cognitive and non-cognitive instruments and programs that measure student skills in relation to academic proficiency and career readiness benchmarks. Of particular interest are solutions that help institutions grant credit for prior learning and experiences; these solutions feature a wide variety of models, from standardized, selected-response tests to predictive analytics models that infer proficiency based on student-level data drawn from multiple sources. The Assessment Services market is composed of two submarkets representing the different evaluation models employed by suppliers.

- The **Instruments** submarket delivers standardized tests, performance tasks, and other assessments to gauge student proficiency. Students may sit for these assessments without being actively enrolled in an institution or as an activity prior to matriculation for placement purposes.
- The **Evaluation** submarket delivers solutions based on analytically driven measurements of experience and participation drawn from a variety of sources. Notable models include course-based portfolio assessments and algorithm-driven evaluations of individuals' competencies and aptitude.

## MARKET OVERVIEW

There are two general strands of development among assessments in this market. One, typically represented in the Instruments submarket, relates to assessments used by institutions to grant credit to students based on content-level proficiencies. The other relates to evaluations and analytics that add depth and color to traditional academic reports, enabled by solutions in the Evaluation submarket.

Instrument-based assessments have long been a part of the postsecondary landscape and student experience. In most cases, this class of solutions has facilitated students' course placement in selected disciplines or furnished some credit for prior learning, albeit often limited, toward degree requirements. The expanding enrollment of non-traditional students with relevant life and work experiences has highlighted the strengths and limitations of these instruments.

Moreover, institutions face increasing pressure to expand the use of these instruments beyond student recruitment and placement, to having the results positively impact the rate and cost at which students achieve their academic goals.

Solutions in the Evaluation submarket typically have their origins outside traditional higher education contexts. These solutions represent an opportunity for institutions in that they capture individuals' interests, dispositions, and skills — characteristics that complement or rival academic reports in terms of employer interest. Cornerstone OnDemand's acquisition of Evolv in October 2014 is an example of an innovative Evaluation supplier being pursued by a more established firm (Cornerstone) with a growing presence in the higher education sector.

Other illustrative investments and transactions in this market:

















- **Smarterer** was acquired by Alternative Education Programs provider Pluralsight for a reported \$75 million in November 2014
- **Gild** has reported raising \$27 million since its launch in 2012 and announced its first acquisition in April 2014

## ILLUSTRATIVE SUPPLIERS














Providers within the Assessment Services market deliver solutions that have one or more of the following attributes:

- Deliver scientifically validated evaluations of an individual's proficiency or mastery in a specific content area or discipline
- Facilitate students' efforts to gain credit for prior learning at an educational institution or another learning-oriented environment (e.g., military, training program, company)
- Provide or contribute to analytics that can personalize or adapt instruction, academic placement, and career planning
- Enable institutions to augment standard academic measures by capturing insight into non-cognitive and social skills

The following table highlights several representative suppliers; note that this table is an illustrative sample and is not intended to be an endorsement or a comprehensive list of providers. In addition, the description of each organization may not capture the full breadth and depth of its capabilities and services. Institutional priorities vary, and the suppliers shown here are intended to furnish context for organizations exploring potential partners relative to their needs.

COMPANY	INFO	OVERVIEW	PRIMARY AUDIENCE	PRIMARY BUYER
<b>ACT (WorkKeys)</b>	<a href="#">Website</a>	A work skills assessment system that offers a career readiness credential.		
<b>College Board (CLEP)</b>	<a href="#">Website</a>	A credit-by-examination program that provides college-level credit to individuals for mastery achieved through a variety of means.		
<b>Excelsior College (UExcel)</b>	<a href="#">Website</a>	A suite of proficiency exams across multiple subjects that enable individuals to earn college-level credit.		
<b>Gild</b>	<a href="#">Website</a>	A solution that works to eliminate bias in the hiring process by enabling companies to identify and acquire tech talent using predictive analytics.		
<b>LearningCounts</b>	<a href="#">Website</a>	An online portfolio development solution that can be used to earn credit at select universities.		
<b>Prometric (DSST)</b>	<a href="#">Website</a>	A suite of subject-based assessments that enable individuals to earn college-level credit for learning that occurs outside a classroom environment.		
<b>Smarterer</b>	<a href="#">Website</a>	A testing platform that provides employers with quantification of employees' skills to inform hiring and placement decisions.		
<b>Taskstream</b>	<a href="#">Website</a>	An accreditation, assessment, and planning solution that serves institutions.		

## SELECTED QUESTIONS FOR INSTITUTIONAL CONSIDERATION

-  Related to technology integration
-  Related to workflow process integration
-  Related to outcomes alignment/integration
  - How does the solution enhance or supplement information that might be reflected on a student transcript? What types of information are included?  
  - Particularly within the Evaluation submarket, with what postsecondary institutions is the supplier engaged? Are there capabilities and services specific to colleges and universities available from the supplier?   
  - Does the solution recommend instruction or learning events? How can data from the system be used to inform adaptive or personalized learning environments?   
  - Does the system support role-based access (e.g., views for test takers, faculty, and administration) to assessment results? What level of reporting or analysis does the solution provide at the enterprise, cohort, and individual levels?  

## MARKET:

# LEARNING AUTHENTICATION SERVICES

### HOW CAN LEARNING AUTHENTICATION SERVICES SUPPORT EoFL INTEGRATION?

#### Technology integration

- Provide machine-readable and portable records of prior learning
- Support secure and rigorous third-party endorsements of credentials

#### Workflow process integration

- Enable a broader range of credential-endorsing entities (e.g., employers, civic and professional organizations)

#### Outcomes alignment/integration

- Articulate learning pathways at levels divorced from traditional course architecture
- Connect competencies and standards among multiple systems and institutions

## DEFINITION

The Learning Authentication Services market includes suppliers that support processes for authenticating courses, experiences, or modules to enable the delivery of credit or validation of learning. Today, these solutions predominantly target non-institutional learning activities that may result in the awarding of digital badges or competency-level credentials. The Learning Authentication Services market is composed of two submarkets that represent the various approaches and uses of suppliers' solutions.

- The **Infrastructure** submarket delivers frameworks, guides, and technologies that allow an organization to develop, adopt, or share credentials or digital badges. This submarket addresses the availability and portability of credentials among organizations and technology systems.
- The **Credentialing** submarket delivers solutions that allow organizations or individuals to authenticate a learning experience and apply digital badges or credentials to recognize, validate, or promote an individual's skills and experiences. This submarket addresses the veracity and value of credentials.

## MARKET OVERVIEW

The Learning Authentication Services market first emerged as a series of new infrastructure capabilities to capture, store, and endorse credentials, namely the Mozilla Open Badges standard and the Experience (formerly Tin Can) API. Both aim to support ecosystems of credentials that can be automatically generated when learning happens. In this context, the Learning Authentication Services infrastructure has developed to support numerous organizations — although generally not traditional postsecondary institutions — in their efforts to acknowledge and reward individuals.

Suppliers in the Credentialing submarket aim to capitalize on the increased visibility of learning experiences occurring outside traditional institutional and coursework contexts. In particular, solutions that can authenticate and endorse credentialing models in ways that postsecondary institutions would be willing to accept for credit are of vital importance

to enhancing integration within the EofL framework. Solutions that serve as platforms for badge-earning students are becoming increasingly useful as opportunities for institutions to explore alternative models and pathways for awarding credit.

The Learning Authentication Services market is composed of a set of suppliers that are distinct from those found in the Assessment Services market. Today, solutions in the Learning Authentication Services market tend to evaluate a course or experience that informs a particular learning pathway, delivering an endorsement of the activities making up the pathway. By contrast, Assessment Services solutions help institutions directly validate a student's level of proficiency or competence in a targeted skill or academic content area. Ultimately, we expect that these distinctions will diminish and the Learning Authentication Services and Assessment Services markets will converge; current limitations with traditional assessment instruments and models, along with broader institutional acceptance of alternative evaluation paradigms, will accelerate this convergence.































## ILLUSTRATIVE SUPPLIERS

Providers within the Learning Authentication Services market deliver solutions that have one or more of the following attributes:

- Facilitate implementation of large-scale recognition, endorsement, or transference of competency-level credits
- Enable organizations to review credit opportunities and requirements from external programs such as internships, informal credentialing platforms, and other experiential learning initiatives
- Allow students to promote themselves to institutions and identify credit opportunities in advance of enrollment
- Provide a secure repository for and authentication of learning experiences tied to specific objectives or competencies

The following table highlights several representative suppliers; note that this table is an illustrative sample and is not intended to be an endorsement or a comprehensive list of providers. In addition, the description of each organization may not capture the full breadth and depth of its capabilities and services. Institutional priorities vary, and the suppliers shown here are intended to furnish context for organizations exploring potential partners relative to their needs.



COMPANY	INFO	OVERVIEW	PRIMARY AUDIENCE	PRIMARY BUYER
<b>Accreditrust</b>	<a href="#">Website</a>	An API framework that allows organizations to curate digital credentials tied to an individual identity.		
<b>ACE (College Credit Recommendation Service)</b>	<a href="#">Website</a>	A service that reviews non-traditional training programs to assess credit equivalency at postsecondary institutions.	 	 
<b>Achievery</b>	<a href="#">Website</a>	A badging platform that allows credential-issuing organizations to register and identify badges that people can earn.	  	  
<b>Advanced Distributed Learning</b>	<a href="#">Website</a>	An organization supporting the Experience API that offers services to improve tracking of experiential learning and the linking of coursework to prior learning.		
<b>Open Badges</b>	<a href="#">Website</a>	A free toolkit from Mozilla that allows non-technologists to build and manage digital badges.	  	
<b>Parchment</b>	<a href="#">Website</a>	A software provider that enables exchange of credentials between and among K-12 and postsecondary institutions and also serves as a repository for both students and institutions to manage their credentials.	 	 
<b>Professional Examination Service</b>	<a href="#">Website</a>	A credentialing services company that offers digital badges with authentication and verification features.	 	 
<b>Saltbox</b>	<a href="#">Website</a>	An analytics company that uses the Experience API to offer organizations a platform to capture and analyze learning activities.	 	 

## SELECTED QUESTIONS FOR INSTITUTIONAL CONSIDERATION

- 🔗 Related to technology integration
- 🔗 Related to workflow process integration
- ☑️ Related to outcomes alignment/integration
  - Does the solution allow individuals to capture and store evidence of their experiences and prior learning? If it does, how does the solution or institution motivate and facilitate individuals to manage their records? 🔗 🔗
  - How does the solution help an institution adapt or personalize students' academic experiences, based on their prior learning? 🔗 🔗 ☑️
  - How does the solution help inform the creation or revision of an institution's learning outcomes or competencies? ☑️
  - To what extent can the supplier facilitate the mapping of institutional competencies and rubrics to existing credentials and platform capabilities? 🔗 🔗 ☑️
  - In what machine-readable formats does the solution export data on credentials or endorsements of credentials? 🔗 🔗 ☑️

### HOW CAN PORTFOLIO PLATFORMS SUPPORT EoFL INTEGRATION?

#### Technology integration

- Provide lifelong access to student portfolios
- Highlight and offer access to support services, internships, and mentors in a single virtual space

#### Workflow process integration

- Connect portfolio scoring and reporting to the issuance of badges and micro-credentials

#### Outcomes alignment/integration

- Allow institutions and employers to align based on common views of student records

## DEFINITION

Providers in the Portfolio Platforms market deliver solutions that enable individuals to aggregate and curate a diverse set of learning artifacts that represent their skills, experience, and interests, derived from both formal and supplemental or informal learning experiences. The Portfolio Platforms market comprises two submarkets.

- The **E-Portfolios** submarket represents suppliers that initially entered the market with dedicated portfolio solutions that enabled a transition to online portfolio assessment models for institutions and students.
- The **Enterprise** submarket includes learning management systems (LMS) and other software platform providers that have introduced a portfolio module within their broader suite of enterprise-level technologies for institutions.

## MARKET OVERVIEW

The practice of using portfolios in education has been common for decades, and online portfolios have been in active use by colleges and universities since the 1990s. Research indicates that more than half of all postsecondary students have exposure to a dedicated portfolio platform as part of their coursework, although figures are undoubtedly higher given the presence of portfolio capabilities in market-leading LMS platforms. Moreover, the increasingly frequent application of experiential learning models and competency-based assessments should help to further proliferate the use of these types of online records platforms at institutions.

The initial wave of web-based solutions emerged in the E-Portfolio submarket and targeted institutional customers to support portfolio assessment models, such as those within schools of education. While positioned as enterprise-wide solutions, E-Portfolio products have generally struggled to secure broad-based institution-wide adoption and deployment. One component of the response has been for E-Portfolio suppliers to expand their platforms beyond an initial focus as a repository for student learning artifacts; solutions now support course or program administration,

promote professional or volunteer opportunities, facilitate access to student support services, and strive to motivate students to manage their portfolios beyond traditional academic experiences.

Another strand of the E-Portfolios submarket includes solutions that target individuals directly, independent of any institutional affiliation. These solutions have generally gained traction as a bridge to employment opportunities, often nurturing robust social communities and tools that function as validators of individuals' capabilities. Several direct-to-student models have generated market interest and investments across the past several years, but both customer acquisition costs and students' aptitude and motivation for curating a digital portfolio have proved to be significant challenges. Ultimately, E-Portfolio solutions within the Portfolio Platforms market should converge with solutions in the Workforce Alignment Platforms market as EofL stakeholders enhance the alignment between credentialing programs, career pathways, and lifelong-learning goals and needs.

Solutions in the Enterprise submarket reflect how broader learning managing system providers extend their platform footprint in response to customer demand. However, Enterprise solutions — particularly with LMS providers — are developed with a focus on the course, both in terms of their user interfaces and data models; in contrast, E-Portfolio solutions are student-centered, generally assuming that learners are the primary stakeholder to serve. This distinction suggests that Enterprise solutions may be challenged to address issues of extensibility and value to students beyond an institutional context.

## ILLUSTRATIVE SOLUTIONS

Providers within the Portfolio Platforms market deliver solutions that have one or more of the following attributes:

- Allow students to maintain portfolios indefinitely after graduation; providers may motivate post-graduation participation by offering features and services supporting lifelong learning and workforce efforts
- Support the recognition and reporting of individual competencies
- Enable institutional initiatives to deliver, score, and report students' assessment performance
- Connect potential employers to student portfolios

The following table highlights several representative suppliers; note that this table is an illustrative sample and is not intended to be an endorsement or a comprehensive list of providers. In addition, the description of each organization may not capture the full breadth and depth of its capabilities and services. Institutional priorities vary, and the suppliers shown here are intended to furnish context for organizations exploring potential partners relative to their needs.

COMPANY	INFO	OVERVIEW	PRIMARY AUDIENCE	PRIMARY BUYER
<b>Behance</b>	<a href="#">Website</a>	A portfolio platform, owned by Adobe, that enables creative professionals to connect with employers.		
<b>Chalk &amp; Wire</b>	<a href="#">Website</a>	An institutional portfolio creation tool with enterprise integration capabilities.		
<b>Degreed</b>	<a href="#">Website</a>	A profile creation tool that allows users to capture formal, workplace, and informal learning.		
<b>LinkedIn</b>	<a href="#">Website</a>	A social networking platform that allows users to create profiles and form connections with other professionals.		
<b>MyEdu</b>	<a href="#">Website</a>	A student-centric platform, owned by Blackboard, that allows students to create portfolios and track degree progress, while also connecting with peers and employers.		
<b>Pathbrite</b>	<a href="#">Website</a>	A portfolio tool offered to both individuals and institutions that allows integration of a variety of digital media.		
<b>PebblePad</b>	<a href="#">Website</a>	A portfolio tool that serves institutions and can be used to document learning experiences or create courseware using a variety of media.		

## SELECTED QUESTIONS FOR INSTITUTIONAL CONSIDERATION

- Related to technology integration
- Related to workflow process integration
- Related to outcomes alignment/integration
  - To what extent does the solution interoperate with existing academic and administrative technology systems at the institution? If limited or no interoperability, what level of effort (i.e., cost, time, FTE) would be required?
  - Does the solution ingest, create, and report digital badges, micro-credentials, or competencies?
  - To what extent does the solution provide ongoing portfolio access to alumni?
  - Can students move their portfolio content to and from other systems?
  - How does the solution support portfolio assessment models? To what extent are rubrics, scoring, and reporting tools and resources available?
  - How does this solution help an institution better understand student needs and adapt student experiences to meet these needs?

## MARKET:

# STUDENT SUPPORT & SUCCESS NETWORKS

### HOW CAN STUDENT SUPPORT & SUCCESS NETWORKS SUPPORT EofL INTEGRATION?

#### Technology integration

- Marry selected data from direct-to-student systems with institutional ones
- Enable analytics on student experiences beyond coursework, producing richer profiles of interests and activities

#### Workflow process integration

- Determine strategy for capitalizing on robust non-institutional solutions supporting students
- Enhance alignment across student recruitment, academic support, counseling, and student placement processes

#### Outcomes alignment/integration

- Support of academic and personal objectives that enhance the acquisition of “evidence”

## DEFINITION

Suppliers in the Student Support & Success Networks market deliver solutions that offer counseling or mentoring services to individuals, often leveraging analytics on social platforms to match mentors to students and job seekers. These solutions help provide students with the information and relationships needed to facilitate a variety of college and career decisions, based on both academic and non-academic considerations. Direct-to-student models are the primary emphasis among solutions in this category, although some suppliers are seeking to exploit institutional channels to secure access to students and provide services to them. This market supports institutionally oriented efforts regarding student persistence and retention.

## MARKET OVERVIEW

The Student Support & Success Networks market is the most nascent market in the EofL framework, but suppliers’ solutions are based on long-standing practices of student counseling, mentorship, and financial aid services. The solutions emerging and evolving in this market offer innovations on traditional site-based student services models; while initially catalyzed by growth in online postsecondary education, the models are now informed by robust social networks and large-scale data analytics.

Most of the solutions in this market employ direct-to-student models, particularly those solutions that are focused on career- and workforce-oriented issues and topics, and they generally exemplify a more automated approach to connecting students with a network of information and services. Many of these solutions leverage peer-to-peer interaction models that facilitate support and assistance and do not require an institutional context. However, these networks are of great significance to colleges and universities within the context of the EofL framework, as they connect students with critical experiences and insights.

Financial viability and sustainability are significant issues for suppliers in this market, given the emphasis on direct-to-consumer service models. While advertising and premium-service revenue models are core tenets of many players, adding institutional and corporate sales efforts is a likely transition for those that fail to achieve sufficient scale.



















## ILLUSTRATIVE SOLUTIONS

Providers within the Student Support & Success Networks market deliver solutions that have one or more of the following attributes:

- Employ analytics to match students with information, opportunities, or relationships
- Enhance or substitute for historically site-based, face-to-face institutional services
- Prioritize direct-to-consumer models that place individuals at the center of the service offering
- Can facilitate institutional capture of student-level data and insights

The following table highlights several representative suppliers; note that this table is an illustrative sample and is not intended to be an endorsement or a comprehensive list of providers. In addition, the description of each organization may not capture the full breadth and depth of its capabilities and services. Institutional priorities vary, and the suppliers shown here are intended to furnish context for institutions exploring potential partners relative to their needs.

 STUDENT
  INSTITUTIONS
  EMPLOYERS
  FOUNDATIONS

COMPANY	INFO	OVERVIEW	PRIMARY AUDIENCE	PRIMARY BUYER
collegefeed	<a href="#">Website</a>	A platform that connects pre-selected college graduates from partnering institutions directly with hiring managers.	 	 
MentorCloud	<a href="#">Website</a>	A network that connects members with experts or advisors in their field or area of interest.	 	
Mytonomy	<a href="#">Website</a>	A social network that offers counseling in career and college readiness through user-created videos.		
Piazza	<a href="#">Website</a>	A network that allows students to source help from their peers using a Q&A format.		
Quora	<a href="#">Website</a>	A direct-to-consumer facilitated network that allows users to ask questions and share knowledge.		
Stack Exchange	<a href="#">Website</a>	A network divided into topic communities that relies on users to ask questions and upvote the most reliable answers.		
StudentMentor.org	<a href="#">Website</a>	A platform that connects college students with professionals who serve as mentors.		 

## SELECTED QUESTIONS FOR INSTITUTIONAL CONSIDERATION

- 🔗 Related to technology integration
- 🔄 Related to workflow process integration
- ☑️ Related to outcomes alignment/integration
  - If the solution is direct-to-consumer, are there options to evaluate it for implementation within an institutional context? If not, is there a way for students to bring data and/or reporting from the solution into institutional systems, should they want to? 🔗 🔄
  - How does the solution track and measure an individual user's engagement and success (e.g., participation, learning, outcomes with mentors)? 🔗 🔄 📄
  - Can outputs from the system be used to inform profiles of students or to personalize their academic experiences at a postsecondary institution? 🔗 🔄 📄
  - What attributes or behaviors derived from a student's experiences are of value to participating employers or institutions? 🔄
  - How does the solution leverage the participation of an institution's alumni? What types of metrics are available regarding the value and impact for alumni participating in the service? 🔄



## MARKET:

# WORKFORCE ALIGNMENT PLATFORMS

### HOW CAN WORKFORCE ALIGNMENT PLATFORMS SUPPORT EofL INTEGRATION?

#### Technology integration

- Facilitate integration of career planning data with institutional portals and student-facing technologies to impact instruction
- Share data among platforms to map academic and career pathways

#### Workflow process integration

- Connect institutional academic services and career services functions more effectively
- Provide analytics on workforce planning and career planning data to benefit institutional planning

#### Outcomes alignment/integration

- Connect student portfolios and profiles to job opportunities and new career considerations
- Validate competencies and degree requirements based on workforce data

## DEFINITION

The Workforce Alignment Platforms market offers solutions that present job descriptions and career pathways and align them with recommended learning requirements and objectives; highlight and facilitate internships and employment opportunities for individuals; and provide other tools and resources to help individuals enter the workforce.

## MARKET OVERVIEW

Initiatives to identify career pathways provide content and structures that help workforce planning efforts, and these data sets are now being used to support job boards and social networks that assist individuals who are seeking opportunities. Many platforms in this market are based on Department of Labor census data and other broad data sets that inform career pathways. A shortcoming of these platform solutions has historically been a lack of longitudinal data and analysis on individual students and job seekers to illuminate trends, such as correlations or commonalities among industries or different market sectors.





















Suppliers in this market that are delivering robust analytics to customers, particularly those platforms that feature unstructured data from a variety of systems and sources, are increasingly valuable to stakeholders in the EofL framework. If providers' workforce analytics were to integrate with academic programs and individual student profiles, the resulting platforms would provide an important and missing link in the EofL ecosystem.

## ILLUSTRATIVE SUPPLIERS
















Providers within the Workforce Alignment Platforms market deliver solutions that have one or more of the following attributes:

- Support primarily job seekers and employers, but may include features that improve institutional support of students for career planning, recruitment, and placement
- Apply analytics to facilitate matching career opportunities to student profiles
- Provide an opportunity for institutions to better understand the variety of student experiences that could potentially earn credit

The following table highlights several representative suppliers; note that this table is an illustrative sample and is not intended to be an endorsement or a comprehensive list of providers. In addition, the description of each organization may not capture the full breadth and depth of its capabilities and services. Institutional priorities vary, and the suppliers shown here are intended to furnish context for organizations exploring potential

 STUDENT  INSTITUTIONS  EMPLOYERS  FOUNDATIONS				
COMPANY	INFO	OVERVIEW	PRIMARY AUDIENCE	PRIMARY BUYER
<b>AfterCollege</b>	<a href="#">Website</a>	A job board that connects students with internship and post-graduate opportunities; also features profile- and portfolio-building capabilities for students.	 	 
<b>Burning Glass</b>	<a href="#">Website</a>	An analytics platform that parses resumes and aggregates data from job boards to match job seekers with open positions and provide market insights.	 	 
<b>Education &amp; Career Positioning System</b>	<a href="#">Website</a>	An institutionally led career planning platform that leverages workforce data; also available for individual licensing to students.		
<b>My Next Move</b>	<a href="#">Website</a>	A job and apprenticeship aggregator that helps users review and refine career interests.	 	
<b>Virtual Career Network</b>	<a href="#">Website</a>	A platform that allows users to explore career pathways and connects them to the credentialing they need in order to qualify for positions in the healthcare, transit, and green industries.	 	

## SELECTED QUESTIONS FOR INSTITUTIONAL CONSIDERATION

-  Related to technology integration
-  Related to workflow process integration
-  Related to outcomes alignment/integration
  - How does the platform match an individual's records to career or academic opportunities?   
  - How does the solution assess individuals evaluating jobs or particular career pathways? What industry or functional standards and competencies are measured and/or integrated into the platform?  
  - Does the solution recommend further instructional requirements or training to individuals, based on their profiles?   
  - Does the solution deliver reports regarding job seekers and workforce planning trends in machine-readable formats?  
  - When individuals join the platform network or community, what types of information or records do they need to declare or upload?  

## APPENDIX A

### EVIDENCE OF LEARNING FRAMEWORK SEGMENTS

The Evidence of Learning framework articulates a set of activities pursued and completed by individuals and organizations within three stakeholder communities – students, colleges and universities, and employers – across five segments: Experience, Validate, Assemble, Promote, and Align. A brief definition of each segment is provided below, along with stakeholder-specific considerations. For a more detailed review of the EofL framework and specific segments, please see *Evidence of Learning: The Case for an Integrated Competency Management System for Students, Higher Education, and Employers*, which can be found at [tytonpartners.com/library](http://tytonpartners.com/library).

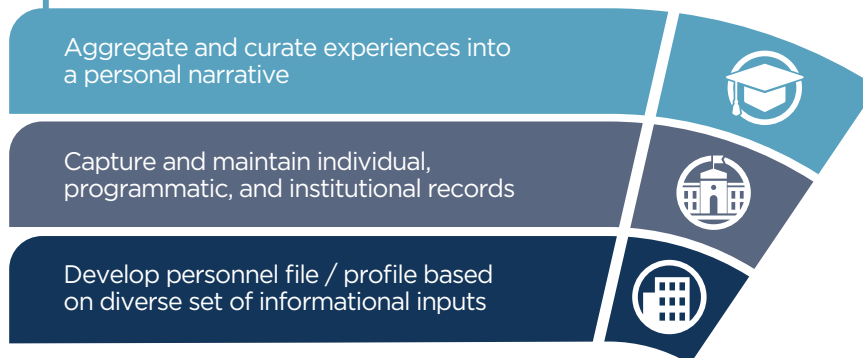
#### EXPERIENCE

Process of learning, either formally or informally; any effort that may be captured as evidence or credentials



#### ASSEMBLE

Process of capturing and curating evidence of learning; creating insights based on networks of experiences/evidence



## ALIGN

Process of securing feedback to enhance and refine performance and capabilities; may lead to pursuit of new opportunities within the experience segment

Access feedback / coaching tools and services to confirm fit and direction



Evaluate efficacy of programs and student outcomes vis-à-vis post-institutional opportunities



Run performance management process to provide workforce feedback



## VALIDATE

Act of assessing and recognizing experiences for academic credit or qualifications

Review and evaluate experiences through a range of assessment protocols



Confirm the extent to which learning and skills development occurs; deliver credential



Confirm possession of requisite skills and experience



## PROMOTE

Act of marketing assembled evidence and mechanisms for creating matches between candidates and opportunities

Present narrative to secure enrollment or employment goals



Enable students to connect aspirations and capabilities to post-institutional opportunities



Attract and recruit candidates to open positions



## APPENDIX B

### INDEX OF SELECTED SUPPLIERS IN THE EVIDENCE OF LEARNING ECOSYSTEM

The table below highlights more than 120 companies active in the seven markets composing the Evidence of Learning ecosystem. These companies and organizations reflect the diversity of providers that are actively targeting and supporting students, institutions, and employers across the EofL framework.

We have aligned each provider with a specific market, based on a review of their offerings during December 2014; however, business models and priorities change, and readers should view this categorization as an initial point of reference should they choose to investigate these providers further. For some organizations with a broad solution footprint, we have noted, in parentheses, a product or initiative that is specific to the Evidence of Learning landscape.

This index should not be viewed as a comprehensive or exhaustive list of companies active in the Evidence of Learning ecosystem. Rather, it is intended to serve as a springboard for college and university leaders and other decision makers to identify and explore providers that may support both specific institutional needs and broader systemic efforts to integrate experiences and validate learning for EofL stakeholders. Any questions regarding this index may be directed to Tyton Partners at [info@tytonpartners.com](mailto:info@tytonpartners.com).

ORGANIZATION	PRIMARY EofL MARKET	WEBSITE
Accreditation Commission for Education in Nursing	Accreditation Services	<a href="http://www.acenursing.org">www.acenursing.org</a>
Accrediting Bureau of Health Education Schools	Accreditation Services	<a href="http://www.abhes.org">www.abhes.org</a>
Accrediting Commission for Community and Junior Colleges, Western Association of Schools and Colleges	Accreditation Services	<a href="http://www.accic.org">www.accic.org</a>
Accrediting Council for Continuing Education & Training	Accreditation Services	<a href="http://accet.org">accet.org</a>
Accrediting Council for Independent Colleges & Schools	Accreditation Services	<a href="http://www.acics.org">www.acics.org</a>
American Bar Association	Accreditation Services	<a href="http://www.americanbar.org/groups/legal_education/resources/accreditation.html">www.americanbar.org/groups/legal_education/resources/accreditation.html</a>

ORGANIZATION	PRIMARY EofL MARKET	WEBSITE
Commission on Accreditation in Physical Therapy Education	Accreditation Services	<a href="http://www.capteonline.org/Home.aspx">www.capteonline.org/Home.aspx</a>
Commission on Massage Therapy Accreditation	Accreditation Services	<a href="http://comta.org">comta.org</a>
Council for the Accreditation of Educator Preparation	Accreditation Services	<a href="http://caepnet.org">caepnet.org</a>
Distance Education Accrediting Commission	Accreditation Services	<a href="http://www.deac.org">www.deac.org</a>
Higher Learning Commission	Accreditation Services	<a href="http://www.ncahlc.org">www.ncahlc.org</a>
Middle States Commission on Higher Education	Accreditation Services	<a href="http://www.msche.org">www.msche.org</a>
National Association of Schools of Art & Design Commission on Accreditation	Accreditation Services	<a href="http://nasad.arts-accredit.org/index.jsp?page=index">nasad.arts-accredit.org/index.jsp?page=index</a>
Southern Association of Colleges & Schools Commission on Colleges	Accreditation Services	<a href="http://www.sacscoc.org">www.sacscoc.org</a>
Align Degree Services	Alternative Education Programs	<a href="http://www.aligndegreeservices.com">www.aligndegreeservices.com</a>
Codecademy	Alternative Education Programs	<a href="http://www.codecademy.com">www.codecademy.com</a>
Corpu	Alternative Education Programs	<a href="http://corpu.com">corpu.com</a>
Coursera	Alternative Education Programs	<a href="http://www.coursera.org">www.coursera.org</a>
Fullbridge	Alternative Education Programs	<a href="http://fullbridge.com">fullbridge.com</a>
Galvanize	Alternative Education Programs	<a href="http://www.galvanize.it/#welcome">www.galvanize.it/#welcome</a>
General Assembly	Alternative Education Programs	<a href="http://generalassemb.ly">generalassemb.ly</a>
Koru	Alternative Education Programs	<a href="http://www.joinkoru.com">www.joinkoru.com</a>
Lynda.com	Alternative Education Programs	<a href="http://www.lynda.com">www.lynda.com</a>
NovoEd	Alternative Education Programs	<a href="http://novoed.com">novoed.com</a>

ORGANIZATION	PRIMARY EofL MARKET	WEBSITE
Peer 2 Peer University	Alternative Education Programs	<a href="http://p2pu.org/en">p2pu.org/en</a>
Pluralsight	Alternative Education Programs	<a href="http://www.pluralsight.com">www.pluralsight.com</a>
Relias Learning	Alternative Education Programs	<a href="http://reliaslearning.com">reliaslearning.com</a>
Skillsoft	Alternative Education Programs	<a href="http://www.skillsoft.com">www.skillsoft.com</a>
Sophia	Alternative Education Programs	<a href="http://www.sophia.org">www.sophia.org</a>
Startup Institute	Alternative Education Programs	<a href="http://www.startupinstitute.com">www.startupinstitute.com</a>
StraighterLine	Alternative Education Programs	<a href="http://www.straighterline.com">www.straighterline.com</a>
Udacity	Alternative Education Programs	<a href="http://www.udacity.com">www.udacity.com</a>
Udemy	Alternative Education Programs	<a href="http://www.udemy.com">www.udemy.com</a>
Viridis Learning	Alternative Education Programs	<a href="http://viridislearning.com">viridislearning.com</a>
ACT	Assessment Services	<a href="http://www.act.org/products.html">www.act.org/products.html</a>
Association of American Colleges & Universities (VALUE)	Assessment Services	<a href="http://www.aacu.org/value/rubrics">www.aacu.org/value/rubrics</a>
Campus Labs	Assessment Services	<a href="http://www.campuslabs.com">www.campuslabs.com</a>
College Board (CLEP)	Assessment Services	<a href="http://clep.collegeboard.org">clep.collegeboard.org</a>
Council for Aid to Education (CLA+)	Assessment Services	<a href="http://cae.org">cae.org</a>
Excelsior College (UExcel)	Assessment Services	<a href="http://www.excelsior.edu/exams/uexcel-home">www.excelsior.edu/exams/uexcel-home</a>
Gild	Assessment Services	<a href="http://www.gild.com">www.gild.com</a>
H&H Publishing (LASSI)	Assessment Services	<a href="http://www.hhpublishing.com">www.hhpublishing.com</a>
Indiana University (National Survey of Student Engagement)	Assessment Services	<a href="http://nsse.iub.edu">nsse.iub.edu</a>



ORGANIZATION	PRIMARY EofL MARKET	WEBSITE
KNEXT	Assessment Services	<a href="http://www.knext.com/for-students/credit-for-life-experience/prior-learning-assessment">www.knext.com/for-students/credit-for-life-experience/prior-learning-assessment</a>
LearningCounts	Assessment Services	<a href="http://www.learningcounts.org">www.learningcounts.org</a>
Prometric (DSST)	Assessment Services	<a href="http://getcollegecredit.com">http://getcollegecredit.com</a>
Skyfactor	Assessment Services	<a href="http://www.skyfactor.com">www.skyfactor.com</a>
Smarterer	Assessment Services	<a href="http://smarterer.com">smarterer.com</a>
SmarterServices	Assessment Services	<a href="http://www.smartermeasure.com">www.smartermeasure.com</a>
Taskstream	Assessment Services	<a href="https://www.taskstream.com">https://www.taskstream.com</a>
TK20	Assessment Services	<a href="http://www.tk20.com">www.tk20.com</a>
Thomas Edison State College (TECEP)	Assessment Services	<a href="http://www.tesc.edu/degree-completion/Testing.cfm">www.tesc.edu/degree-completion/Testing.cfm</a>
Accreditrust	Learning Authentication Services	<a href="http://www.accreditrust.com">www.accreditrust.com</a>
ACE (College Credit Recommendation Service)	Learning Authentication Services	<a href="http://www.acenet.edu/news-room/Pages/ACE-CREDIT-Course-Review.aspx">http://www.acenet.edu/news-room/Pages/ACE-CREDIT-Course-Review.aspx</a>
Achievery	Learning Authentication Services	<a href="http://achievery.com">achievery.com</a>
Advanced Distributed Learning	Learning Authentication Services	<a href="http://www.adlnet.gov/tla/experience-api">www.adlnet.gov/tla/experience-api</a>
Badges for Vets	Learning Authentication Services	<a href="http://badgesforvets.org">badgesforvets.org</a>
Credly	Learning Authentication Services	<a href="http://credly.com">credly.com</a>
Degree Qualifications Profile	Learning Authentication Services	<a href="http://degreeprofile.org">degreeprofile.org</a>
Manufacturing Institute (Skills Certification System)	Learning Authentication Services	<a href="http://www.themanufacturinginstitute.org/Skills-Certification/Skills-Certification.aspx">www.themanufacturinginstitute.org/Skills-Certification/Skills-Certification.aspx</a>
Mozilla (Open Badges)	Learning Authentication Services	<a href="http://openbadges.org">openbadges.org</a>
National College Credit Recommendation Service	Learning Authentication Services	<a href="http://www.nationalccrs.org">www.nationalccrs.org</a>

ORGANIZATION	PRIMARY EofL MARKET	WEBSITE
National Student Clearinghouse	Learning Authentication Services	<a href="http://www.studentclearinghouse.org">www.studentclearinghouse.org</a>
Open Badge Exchange	Learning Authentication Services	<a href="http://openbadge.exchange">openbadge.exchange</a>
Open Badge Factory	Learning Authentication Services	<a href="http://openbadgefactory.com">openbadgefactory.com</a>
Parchment	Learning Authentication Services	<a href="http://www.parchment.com">www.parchment.com</a>
Professional Examination Service	Learning Authentication Services	<a href="http://www.proexam.org/index.php">www.proexam.org/index.php</a>
Saltbox	Learning Authentication Services	<a href="http://www.saltbox.com">www.saltbox.com</a>
SCRIP-SAFE	Learning Authentication Services	<a href="http://www.scrip-safe.com">www.scrip-safe.com</a>
WICHE (Interstate Passport Initiative)	Learning Authentication Services	<a href="http://www.wiche.edu/passport/about">www.wiche.edu/passport/about</a>
World Education Services	Learning Authentication Services	<a href="http://www.wes.org/students">www.wes.org/students</a>
Adobe (Behance)	Portfolio Platforms	<a href="http://www.behance.net">www.behance.net</a>
Avenet (myefolio)	Portfolio Platforms	<a href="http://www.myefolio.com">www.myefolio.com</a>
Blackboard (MyEdu)	Portfolio Platforms	<a href="http://www.myedu.com">www.myedu.com</a>
Carbonmade	Portfolio Platforms	<a href="http://carbonmade.com">carbonmade.com</a>
Chalk & Wire	Portfolio Platforms	<a href="http://www.chalkandwire.com">www.chalkandwire.com</a>
D2L	Portfolio Platforms	<a href="http://www.brightspace.com/solutions/higher-education">www.brightspace.com/solutions/higher-education</a>
Data180	Portfolio Platforms	<a href="http://www.data180.com/index.php">www.data180.com/index.php</a>
Degreed	Portfolio Platforms	<a href="http://degreed.com">degreed.com</a>
Digication	Portfolio Platforms	<a href="http://www.digication.com">www.digication.com</a>
Edvance360	Portfolio Platforms	<a href="http://www.edvance360.com">www.edvance360.com</a>
Folio Technologies	Portfolio Platforms	<a href="http://www.pwc.com/us/en/audit-assurance-services/valuation/deploy-capital-value-projects-efficiently.jhtml">www.pwc.com/us/en/audit-assurance-services/valuation/deploy-capital-value-projects-efficiently.jhtml</a>

ORGANIZATION	PRIMARY EofL MARKET	WEBSITE
Instructure	Portfolio Platforms	<a href="http://www.instructure.com/higher-education">www.instructure.com/higher-education</a>
LinkedIn	Portfolio Platforms	<a href="http://www.linkedin.com">www.linkedin.com</a>
LiveText	Portfolio Platforms	<a href="http://www.livetext.com">www.livetext.com</a>
Mahara	Portfolio Platforms	<a href="http://mahara.org">mahara.org</a>
Nuventive	Portfolio Platforms	<a href="http://nuventive.com">nuventive.com</a>
Pathbrite	Portfolio Platforms	<a href="http://pathbrite.com">pathbrite.com</a>
PebblePad	Portfolio Platforms	<a href="http://www.pebblepad.co.uk">www.pebblepad.co.uk</a>
Portfolium	Portfolio Platforms	<a href="http://portfolium.com">portfolium.com</a>
Reason Systems	Portfolio Platforms	<a href="http://www.reason.com/XSpacehomeshellc.cfm?">www.reason.com/XSpacehomeshellc.cfm?</a>
Seelio	Portfolio Platforms	<a href="http://seelio.com">seelio.com</a>
Symplicity	Portfolio Platforms	<a href="http://www.symplicity.com/reflection">www.symplicity.com/reflection</a>
Webanywhere	Portfolio Platforms	<a href="http://www.webanywhere.co.uk">www.webanywhere.co.uk</a>
Workstory	Portfolio Platforms	<a href="http://www.workstory.com">www.workstory.com</a>
Blikbook	Student Support & Success Networks	<a href="http://www.blikbook.com">www.blikbook.com</a>
ClusterFunk	Student Support & Success Networks	<a href="http://next.clusterflunk.com">next.clusterflunk.com</a>
collegefeed	Student Support & Success Networks	<a href="http://www.collegefeed.com/">www.collegefeed.com/</a>
Course Hero	Student Support & Success Networks	<a href="http://www.coursehero.com/?no_redir=1">www.coursehero.com/?no_redir=1</a>
Github	Student Support & Success Networks	<a href="http://github.com/">github.com/</a>
Knodium	Student Support & Success Networks	<a href="http://www.knodium.com">www.knodium.com</a>
MentorCloud	Student Support & Success Networks	<a href="http://www.mentorcloud.com/#about">www.mentorcloud.com/#about</a>
Mytonomy	Student Support & Success Networks	<a href="http://www.mytonomy.com">www.mytonomy.com</a>

ORGANIZATION	PRIMARY EofL MARKET	WEBSITE
Piazza	Student Support & Success Networks	<a href="http://piazza.com">piazza.com</a>
Quora	Student Support & Success Networks	<a href="http://www.quora.com/about">www.quora.com/about</a>
Stack Exchange	Student Support & Success Networks	<a href="http://academia.stackexchange.com">academia.stackexchange.com</a>
StudentMentor.org	Student Support & Success Networks	<a href="http://www.studentmentor.org">www.studentmentor.org</a>
YouScience	Student Support & Success Networks	<a href="http://www.youscience.com">www.youscience.com</a>
10 Minutes With	Workforce Alignment Platforms	<a href="http://www.10minuteswith.com">www.10minuteswith.com</a>
AfterCollege	Workforce Alignment Platforms	<a href="http://www.aftercollege.com">www.aftercollege.com</a>
AnalyzeMyCareer.com	Workforce Alignment Platforms	<a href="http://www.analizemycareer.com">www.analizemycareer.com</a>
Burning Glass	Workforce Alignment Platforms	<a href="http://www.burning-glass.com">www.burning-glass.com</a>
CareerBuilder	Workforce Alignment Platforms	<a href="http://www.careerbuilder.com">www.careerbuilder.com</a>
Career Cruising	Workforce Alignment Platforms	<a href="http://public.careercruising.com/en/#">public.careercruising.com/en/#</a>
CareerMotivations	Workforce Alignment Platforms	<a href="http://www.careermotivations.com">www.careermotivations.com</a>
CareerOneStop	Workforce Alignment Platforms	<a href="http://www.careeronestop.org">www.careeronestop.org</a>
Chegg	Workforce Alignment Platforms	<a href="http://www.chegg.com">www.chegg.com</a>
Education & Career Positioning System	Workforce Alignment Platforms	<a href="http://www.epsdevice.com/home.html">www.epsdevice.com/home.html</a>
LearnUp	Workforce Alignment Platforms	<a href="http://www.learnup.com">www.learnup.com</a>
Monster.com	Workforce Alignment Platforms	<a href="http://www.monster.com">www.monster.com</a>
My Next Move	Workforce Alignment Platforms	<a href="http://www.mynextmove.org/">www.mynextmove.org/</a>

ORGANIZATION	PRIMARY EofL MARKET	WEBSITE
Sokanu	Workforce Alignment Platforms	<a href="http://www.sokanu.com">www.sokanu.com</a>
Vault.com	Workforce Alignment Platforms	<a href="http://www.vault.com">www.vault.com</a>
Virtual Career Network	Workforce Alignment Platforms	<a href="http://www.vcn.org/index.php">www.vcn.org/index.php</a>

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- Dr. Jeff King, Executive Director, Center for Excellence in Transformative Teaching and Learning, University of Central Oklahoma
- Leah Lommel, Assistant Vice President of Development, Arizona State University
- Amy McQuigge, Special Projects Coordinator, SUNY Empire State College
- Dr. Terrel Rhodes, Vice President for Quality, Curriculum, and Assessment, Association of American Colleges and Universities (AAC&U)
- Yvonne Simon, Chief Learning Architect, College for America at Southern New Hampshire University
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Finally, any errors, omissions, or inconsistencies across these two publications are the responsibility of Tyton Partners alone.

## BIOGRAPHIES

### **ADAM NEWMAN**, *Managing Partner*

Adam Newman is a co-founder of Tyton Partners, with more than 20 years of experience in strategy consulting, market research, and investment banking supporting the education sector. Adam began his professional career as a K-12 educator and athletic coach at schools in Boston, MA, and New Orleans, LA.

### **TERRY MILES**, *Senior Consultant*

Terry Miles has worked in educational leadership and technology product development for companies, institutions, and organizations across the public and private sectors. Terry has been a senior consultant with Tyton Partners since December 2013, while also serving as co-founder and chief product officer for a start-up focused on collaborative and personalized learning.

### **GATES BRYANT**, *Partner*

Gates Bryant is a general manager and strategy consultant with a successful track record for bridging the gap between innovative strategy and practical execution. He joined Tyton Partners as a partner in 2011.

## ABOUT TYTON PARTNERS

Tyton Partners, formerly Education Growth Advisors, is the leading provider of investment banking and strategy consulting services to the global knowledge sector. Built on the tenets of insight, connectivity, and tenacity, Tyton Partners leverages in-depth market knowledge and perspective to help organizations pursue solutions that have lasting impact.

As an evolved advisory services firm, Tyton Partners offers a unique spectrum of services that supports companies, organizations, and investors as they navigate the complexities of the education, media, and information markets. Unlike most firms, Tyton Partners understands the intricacies and nuances of these markets and plays an integral role in shaping the efforts that drive change within them. The firm's expertise is predicated on its principals' years of experience working across market segments – including the preK-12, postsecondary, corporate training, and lifelong learning sectors – and with a diverse array of organizations, from emergent and established private and publicly traded companies, to non-profit organizations, institutions, and foundations, to private equity and venture capital firms and other investors.

Tyton Partners leverages its deep transactional and advisory experience and its extensive global network to make its clients' aspirations a reality and catalyze innovation in the global knowledge sector.

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