



TIME FOR CLASS:

LESSONS FOR THE FUTURE OF DIGITAL
COURSEWARE IN HIGHER EDUCATION

PART 1: FACULTY PERSPECTIVES
ON COURSEWARE

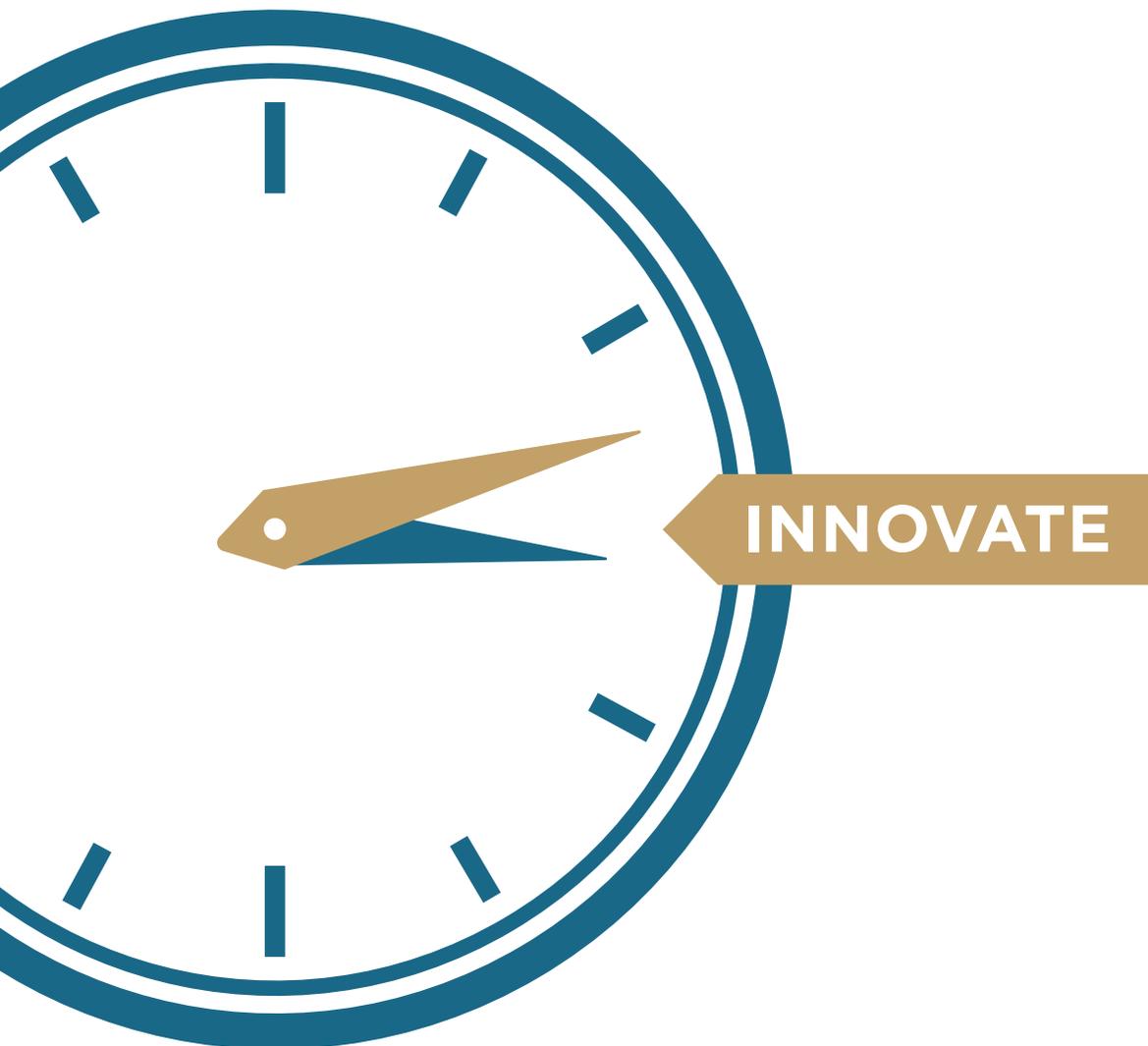


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PART 1: FACULTY PERSPECTIVES ON COURSEWARE

In July and August 2014, Tyton Partners (formerly Education Growth Advisors), with support from the Bill and Melinda Gates Foundation, developed and administered two surveys to national samples of postsecondary faculty and administrators. The objective of these surveys was to better understand the current level of adoption of digital courseware in US postsecondary education, as well as to collect practitioner perspectives on digital courseware use and barriers to further adoption.

*We define digital courseware as **curriculum delivered through purpose-built software to support teaching and learning**. We received over 2,700 responses from faculty and administrators, providing a new lens into the classroom and new insights on dynamics impacting the use of digital courseware in postsecondary education. Alongside these two surveys, Tyton Partners analyzed over 120 products from across the courseware supplier landscape through company surveys, interviews, and secondary research.*

Through a series of three issue briefs, we will present the findings from our research and propose tools that will support both institutions and suppliers.

Part 1: Faculty Perspectives on Courseware

Part 2: Evolution of Courseware Suppliers

Part 3: Charting a Path Forward to Redefine Courseware

In part 1, we will focus on the faculty perspective and discuss courseware adoption by postsecondary institutions in the US. We will highlight the obstacles to expanding adoption and realizing the potential teaching and learning gains. Across this series, we will include important implications and recommendations for faculty, administrators, and courseware providers.

NOTE:

Education Growth Advisors became **Tyton Partners** in February 2015. To learn more, [click here](#).

Executive Summary: Pressure is mounting in the postsecondary education ecosystem to improve the quality of teaching and learning, while increasing accessibility and affordability for students. While it is widely accepted that educational outcomes are better when instruction is personalized to students' needs and objectives, effective personalized learning has historically been achieved in a face-to-face context that is instructor-intensive, a model that doesn't fit today's demand for more flexible learning experiences for millions of students.

Digital courseware has the potential to alleviate the pressures building in postsecondary education through scalable, personalized instruction; however, the category as a whole has not delivered on its promise. Our comprehensive scan of the market revealed that digital courseware enjoys high awareness and significant use by postsecondary faculty, but leaves many users woefully dissatisfied and also faces considerable barriers to further adoption. In the face of increasing demands on the postsecondary system, these findings are a call to action for institutions and suppliers to redefine digital courseware and to catalyze improved teaching and learning.

Ongoing endeavors to validate digital courseware's efficacy in delivering student outcomes reflect the prevailing perspective that digital courseware has not yet proved its worth and, as a result, is not reaching its full market potential in terms of scale and breadth of adoption. Tyton Partners' survey of postsecondary faculty confirmed the importance of efficacy to courseware users but also revealed significant barriers to adoption and alarming courseware dissatisfaction unrelated to efficacy. It also hinted at the importance of supportive institutional conditions for faculty to use digital courseware.

These findings indicate that **proving the efficacy of digital courseware shouldn't be considered a panacea for lagging adoption of a single courseware product or the segment as a whole, and that changes must be made by both suppliers and institutions to support adoption of digital courseware at scale.** In this paper, we will highlight issues and opportunities revealed by our faculty research on courseware adoption, and make recommendations to supplier and institutional stakeholders to help resolve key adoption hurdles that are often overshadowed by efficacy concerns but are equally important to overcome.

A MARKET FOR STUDENT OUTCOMES

Visit the website of most digital courseware providers and within seconds you'll see a pitch to improve learning outcomes for users. Some companies assert that their products work through the acceleration of learning; others offer personalization or improved engagement; and yet others market the ability to generate improved learning from another angle altogether. Regardless of how it is being achieved, improving learning outcomes is clearly considered essential to driving demand and product adoption in the digital courseware space, and with good reason — the market has made it clear that outcomes are valuable.

CEREGO

“The easiest way to learn faster and remember longer”

ACROBATIQ

“Our focus is on improving student learning outcomes”

PEARSON MYLAB

“Deliver consistent, measurable gains in student learning outcomes”

MCGRAW-HILL CONNECT

“Saves students and instructors time while improving performance over a variety of critical outcomes”

MINDTAP

“Students who used MindTap performed 29% better than those who did not”

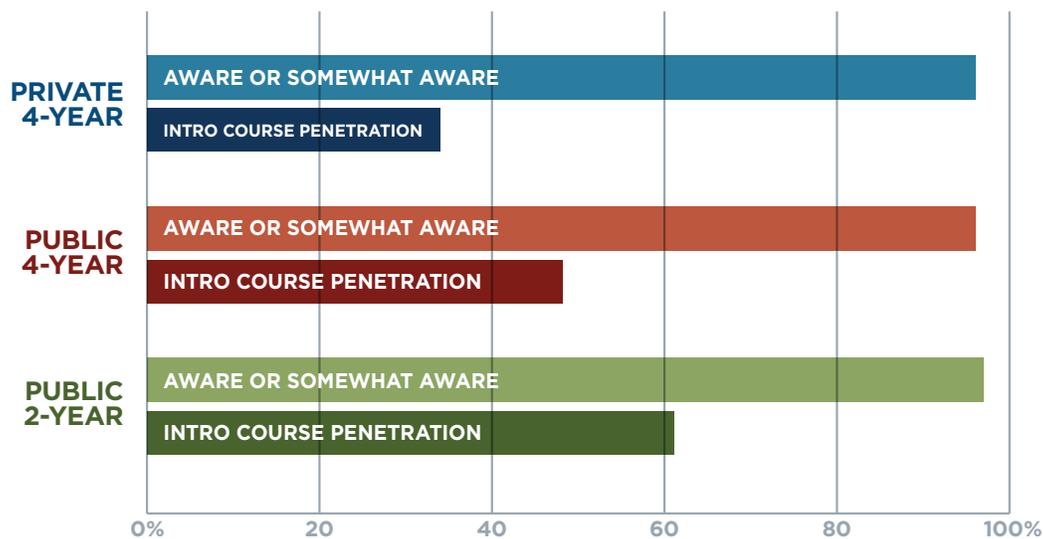
Many courseware companies substantiate their claims with research and case studies pointing to the impacts their products have had on student learning, but they are not the only stakeholders looking to validate courseware efficacy. Foundations, postsecondary institutions, and public agencies have also worked to assess courseware's impact on student learning in order to confirm the potential advantage of digital courseware and thus validate past and possible future investment.

The abundance of efforts to validate courseware's impact on student outcomes suggests a prevailing perspective that efficacy is key to converting non-users of courseware to users, and thus to unlocking full market and learning outcomes potential. While our research substantiates the importance of efficacy, it also provides insights into faculty experiences and perspectives that challenge the notion of efficacy as a silver bullet to drive courseware adoption. The existence of other significant barriers to adoption, along with high levels of dissatisfaction with courseware products, suggests that efforts must be made to bring down multiple barriers if we are to see digital courseware implemented with greater scale and with favorable impact on student outcomes. **By listening to faculty demands for simpler products that are less time-consuming to adopt and customize, and by evaluating institutional conditions for use, suppliers and institutions could make digital courseware a less daunting tool for faculty to adopt.**

SNAPSHOT OF COURSEWARE ADOPTION IN POSTSECONDARY EDUCATION

Survey data collected from over 1,300 faculty members revealed surprisingly high levels of adoption of digital courseware among postsecondary faculty. 96% of respondents reported being aware or somewhat aware of digital courseware and how it can be used in a class, and 54% of respondents used digital courseware during the last academic year. Analysis of the number and types of courses these faculty members teach implies that digital courseware is being used in 34%–61% of introductory-level courses, depending on the type of institution.

POSTSECONDARY FACULTY AWARENESS OF DIGITAL COURSEWARE AND INTRODUCTORY COURSE PENETRATION BY INSTITUTION TYPE



A majority of faculty using courseware reported having influence or decision-making authority in the selection of digital courseware materials used in the courses they teach — a decision of increasing significance given the growth of courseware usage shown in Tyton Partners’ survey results. 77% of respondents who used courseware in the last academic year reported using it more now than they did three years ago. When asked what factors have had the most impact on their change in courseware usage, 60% of faculty selected having become “more/less comfortable in the use of digital learning tools” in their courses, while 39% of users reported that “change in courseware product offerings” has been one of the most important factors.

The survey data reflected a materially higher level of courseware adoption than anticipated. We expect that the high adoption is a reflection of the diverse range of products being applied as courseware in the postsecondary ecosystem. We sought to capture the range of products in the survey through a broad definition of courseware, including instructional materials administered through learning management systems and online course delivery tools.

BARRIERS TO ADOPTION OF DIGITAL COURSEWARE

Survey participants were asked to identify the three most significant barriers to adoption at their institution, choosing from a list of 20 potential barriers. The leading barriers identified by respondents across institution types reflected consistent faculty concern over efficacy as well as classroom-level issues — impact on faculty time, faculty control over instructional method and course experience, and technical integration challenges.

TOP BARRIERS TO ADOPTION OF COURSEWARE BY INSTITUTION TYPE

	PRIVATE 4-YEAR	PUBLIC 4-YEAR	PUBLIC 2-YEAR
HIGHEST BARRIERS	1	ADDITIONAL TIME REQUIRED FOR FACULTY	ADDITIONAL COST TO STUDENTS
	2	EFFICACY OF DIGITAL COURSEWARE IN IMPROVING LEARNING OUTCOMES	EFFICACY OF DIGITAL COURSEWARE IN IMPROVING LEARNING OUTCOMES
	3	LACK OF ALIGNMENT WITH MY PHILOSOPHY OF INSTRUCTIONAL DESIGN	LACK OF ALIGNMENT WITH MY PHILOSOPHY OF INSTRUCTIONAL DESIGN
	4	REDUCED CONTROL OVER COURSE CONTENT AND STUDENT EXPERIENCE	TECHNICAL INTEGRATION CHALLENGES
	5	TECHNICAL INTEGRATION CHALLENGES	RESISTANCE TO SHIFT IN INSTRUCTIONAL METHOD

CLASSROOM-LEVEL BARRIERS

OTHER BARRIERS

“Additional time required for faculty” was selected as the most significant barrier to adoption for faculty as a whole by a large margin, with 40% of faculty indicating that this factor was a top barrier at their institution. Review of open responses to the survey gave color to this wide-ranging issue, with some of the most common concerns being:

- A steep learning curve and a time investment required up front to use digital courseware *effectively*
- Technical integration challenges adding to the time required from faculty to use courseware
- The cost-benefit trade-off: for many faculty members, the time required isn’t worth the potential — but unproven — benefit in terms of student outcomes

“Clarifying ‘Faculty time’ is very important. It takes LOTS of time to PROPERLY develop customized digital courseware. It takes time to FIND EXISTING digital courseware that fits properly into course goals. It takes about zero time to simply be videotaped delivering lectures ... and then have that available for self-study by others (but this is a very poor learning method).”

- Part-Time Faculty Member

“I think most faculty at my institution appreciate courseware, but the learning curves are steep and the preparation time is a killer! Once you decide to use courseware, you are in for a long but interesting ‘slog’ to learn a system, to create materials for class, and to keep growing. After 12 years and the use of four different packages, I have yet to find a student who thinks it has improved their education in ways other than decreasing the amount of time they have to spend in the library.”

- Full-Time Tenured Faculty Member

“The product has a lot of perks in that it is great as an online homework and tutoring tool, gives students more resources for studying, cuts down on grading time. I am still not certain about the effects on my learning outcomes, and technical and technology-driven issues demand a lot of attention from me, adding to my time rather than saving it.”

- Full-Time Faculty Member

26% of faculty identified “Efficacy of digital courseware in improving learning outcomes” as a top three barrier to adoption, confirming the importance of digital courseware’s ability to deliver student outcomes from the perspective of postsecondary faculty. Along similar lines, when asked to share their perspective on the potential impact of digital courseware, 52% of faculty reported that they “value the potential impact,” while 28% of faculty were neutral and another 20% were “skeptical about the efficacy of digital courseware,” further demonstrating that there is still a significant gap to be bridged with regard to evidence of efficacy.

“Blended/digital courseware approaches need more convincing, rigorous analysis in terms of learning outcomes to convince schools to implement them. Research is needed to cut through the hype and provide a set of best practices.”

- Full-Time Tenure-Track Faculty Member

A theme of faculty control over instruction and classroom experience was raised through three of the remaining top barriers to adoption: “Lack of alignment with my philosophy of instructional design,” “Reduced control over course content and student experience,” and “Resistance to shift in instructional method.” The prevalence of these barriers, coupled with the fact that 71% of survey respondents indicated a preference for developing their own curriculum and content versus using existing third-party content, reflects faculty desires to drive the instructional experience, and hints at the existence of an either-or mentality with regard to using courseware — either you have control, or you use courseware.

Notably, faculty from public two-year institutions reported “Additional cost to students” as the highest barrier to adoption at their institutions. This was the only institutional group to report cost as a top barrier, and their concern is likely a reflection of the different mission and demographic served by public two-year institutions relative to many four-year institutions.

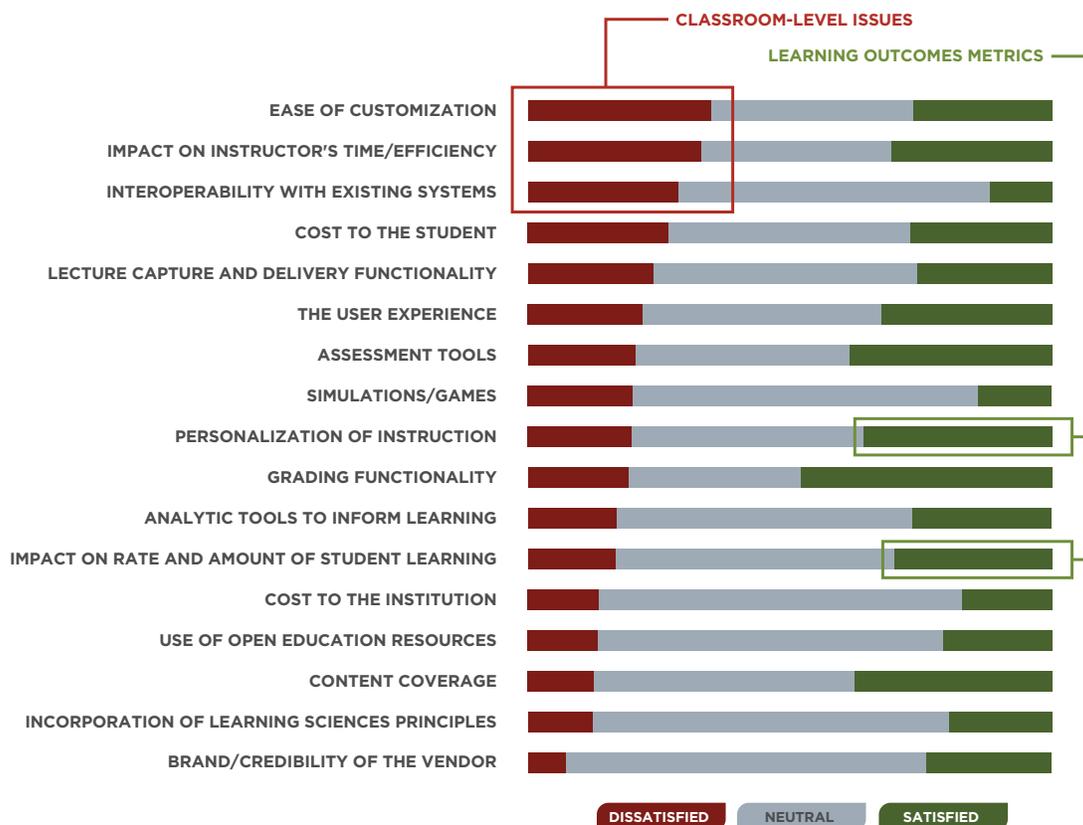
“A big concern is money, plain and simple. I like to give online content ... but quite a few students still do not have computers in their homes, or are not computer literate. This creates a barrier to education.”

- Part-Time Faculty Member

(DIS)SATISFACTION WITH COURSEWARE PRODUCTS

Findings around courseware product satisfaction echoed the key takeaways from the “barriers to adoption” analysis. When asked to evaluate the attributes and characteristics of their courseware products, faculty reported the greatest levels of dissatisfaction around classroom-level issues — “Ease of customization,” “Impact on instructor’s time/efficiency,” and “Interoperability with existing systems” being the top three for faculty in aggregate. Encouragingly, metrics associated with learning outcomes, like “Personalization of instruction” and “Impact on rate and amount of student learning” actually earned higher levels of satisfaction than dissatisfaction among faculty respondents.

FACULTY SATISFACTION WITH COURSEWARE ATTRIBUTES AND OUTCOMES

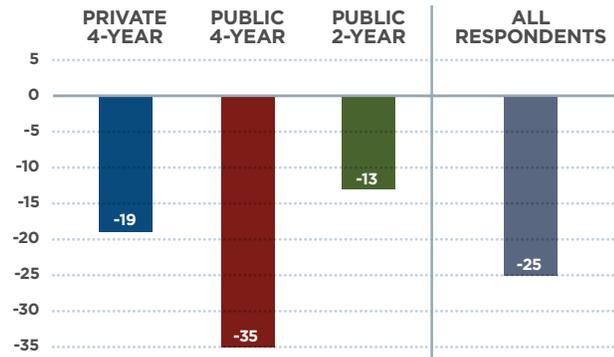


Breaking out faculty satisfaction and dissatisfaction by institution type again reveals concerns from faculty at public two-year institutions over expense to students. Specifically, 36% of faculty respondents from public two-year institutions were dissatisfied by digital courseware’s cost to students, making this factor the greatest area of dissatisfaction for that group.

Given the high levels of awareness and adoption revealed in the survey, the overall satisfaction with digital courseware as indicated by a Net Promoter Score (NPS) was dimly low. A Net Promoter Score is evaluated by asking, “How likely are you to recommend this [product, service, or company] to a friend or colleague?” with 10 being “very likely” and 0 being “not at all likely.” People responding 9 or 10 are considered to be promoters of the product, those who select 7 or 8 are neutral, and respondents indicating 6 or below are considered to be detractors. The NPS is calculated

by subtracting the portion of respondents that are detractors from the portion that are promoters, and it is a metric used by companies across industries as an indication of customer satisfaction. When our faculty survey respondents were asked whether they would recommend their courseware product to a friend or colleague at their own or another institution, only 15% reported that they are “very likely” to do so by selecting a 9 or 10. Assessing the NPS of digital courseware as a category resulted in a –25, meaning that the majority of faculty users of digital courseware are actually detractors of their courseware, with some variation in the level of dissatisfaction by institution type.

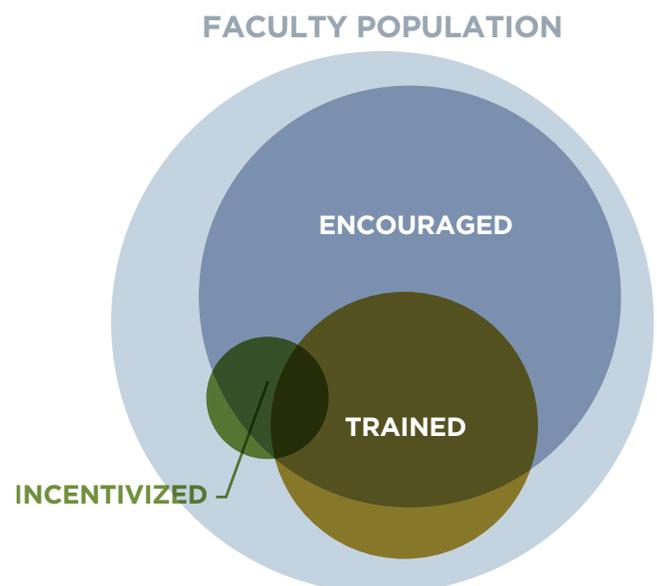
COURSEWARE NET PROMOTER SCORE BY INSTITUTION TYPE



INSTITUTIONAL ENVIRONMENT FOR COURSEWARE USE

Over 60% of respondents reported that faculty at their institutions are encouraged to use digital courseware. However, far fewer reported being trained (30%) or incentivized (15%) to do so effectively.

Not explicitly represented in the quantitative survey data, but potentially equally significant, is that in addition to a lack of explicit incentives for faculty to implement digital courseware, there are frequently implicit disincentives at play in some postsecondary environments. For example, at some institutions, many instructors are working toward tenure or must balance instruction with research time. In those environments, there may be a perception that putting forth the effort required to implement digital courseware



could have a detrimental impact on other, higher-priority projects with long-lasting, career-changing effects. The cost for those faculty members to implement digital courseware is often too high to even consider it. This reflects a lack of alignment between institutional objectives and the conditions to support faculty in achieving those objectives.

“As a faculty member, I have to select which topics to stay ahead of. Research is considered far more important and prestigious than teaching, so after getting a grant to cover course release time or summer salary for research, we no longer have more time to commit to new teaching projects. Digital courseware is a very significant commitment, whether we use someone else’s product (and I know of no self-contained products) or we use our own. The leaders in academia are already overcommitted with other projects, and chairs often do not allow us to have more than one course release in a semester. One alternative would be extended leaves for faculty, in a similar fashion as a sabbatical, to get involved with digital courseware. NSF [National Science Foundation] has rotator positions for faculty, so why not [the education] industry?”

- Full-Time Tenured Faculty Member

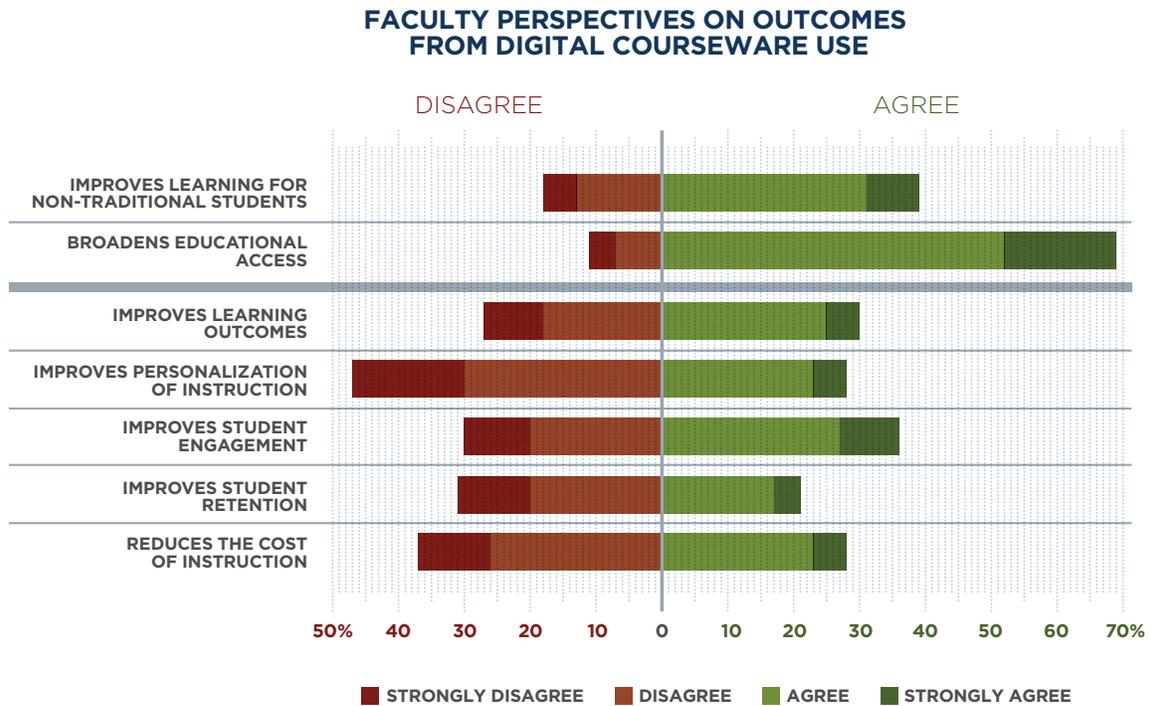
“I think that this survey misses an enormous and obvious obstacle to the use of digital courseware. At many institutions, particularly research universities, faculty are not incentivized to teach — period. Teaching isn’t encouraged, incentivized, or evaluated. Rather, faculty are told to minimize the effort they put into teaching in order to focus on research and grantwriting. So it’s hardly surprising that few want to investigate digital courseware or learn how to use technology to improve their teaching. They don’t care about teaching in the first place!”

- Full-Time Tenure-Track Faculty Member

“I feel pressured to use online instruction in some way at our institution, but I believe it mostly requires an increase in labor for instructors. I am not sure of the benefit it actually provides over traditional delivery in my area of teaching.”

- Full-Time Tenured Faculty Member

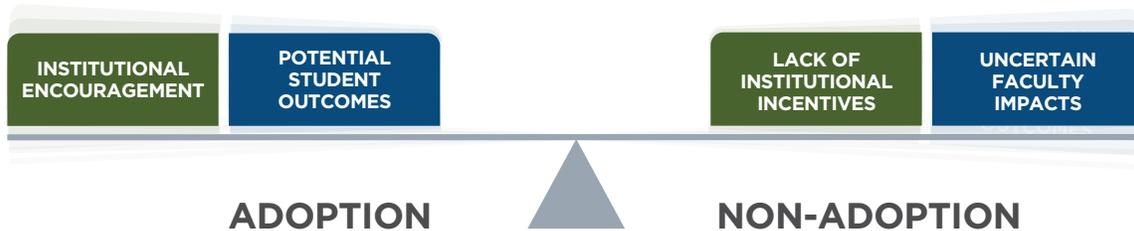
Another important institutional consideration for courseware usage is the objective being sought through instruction with courseware. When asked whether they agree with courseware’s ability to drive certain outcomes as compared to more traditional, face-to-face instructional methods, faculty respondents generally expressed a lack of consensus around which outcomes are driven by courseware.



The greatest consensus among faculty is seen around courseware’s ability to improve learning for non-traditional students and broaden educational access, two outcomes that are most commonly associated with the mission and demographics of public two-year institutions. Interestingly, compared to their peers at four-year institutions, faculty from public two-year institutions also reported the highest awareness and introductory-level course penetration of digital courseware. We hypothesize that the ability to connect outcomes with the mission of public two-year institutions may contribute to more supportive environments for courseware adoption at those institutions.

A CALL TO ACTION

The negative time and instructional impacts of digital courseware on some faculty, coupled with the still unproven learning benefits for students, makes further adoption of courseware a challenge. While the ongoing efforts to achieve and prove efficacy in delivering student outcomes are necessary, we believe that suppliers and institutions seeking to broaden courseware adoption have a responsibility to change the way courseware impacts the day-to-day workflow and longer-term career trajectory of postsecondary faculty. Below are our suggestions on first steps for stakeholders on both sides of the courseware market.



COURSEWARE SUPPLIERS - FOCUS ON THE FACULTY USER EXPERIENCE

Parallels between primary adoption barriers and areas of courseware product dissatisfaction present a major opportunity to diminish barriers while improving the user experience for existing customers through the same key product improvements. Areas of focus for product improvements include:

- Ease of product adoption and implementation by faculty
- Ease of technical integration with existing institutional systems
- Ease of use for customization/configuration of course content

Similarly, robust training for users of digital courseware has the potential for significant impact, working to mitigate multiple concerns about the effect courseware may have on the faculty teaching experience. Specifically:

- Guiding faculty on the use of digital courseware as a **tool for instruction** could help alleviate apprehension around loss of control in the classroom
- Dissemination of **time-saving best practices** could ease the perceived time burden associated with the initial learning curve for digital courseware and could support more efficient use once faculty members are proficient

POSTSECONDARY INSTITUTIONS – CREATE CONDITIONS FOR SUCCESS

Tension is created where faculty are encouraged to use digital courseware but face an institutional environment that doesn't facilitate easy adoption through clear objectives, incentives, and supportive infrastructure for courseware use. Institutional leadership should take time to evaluate the conditions that may support or act as disincentives for faculty to use digital courseware at their institutions. We suggest reflecting on the following questions:

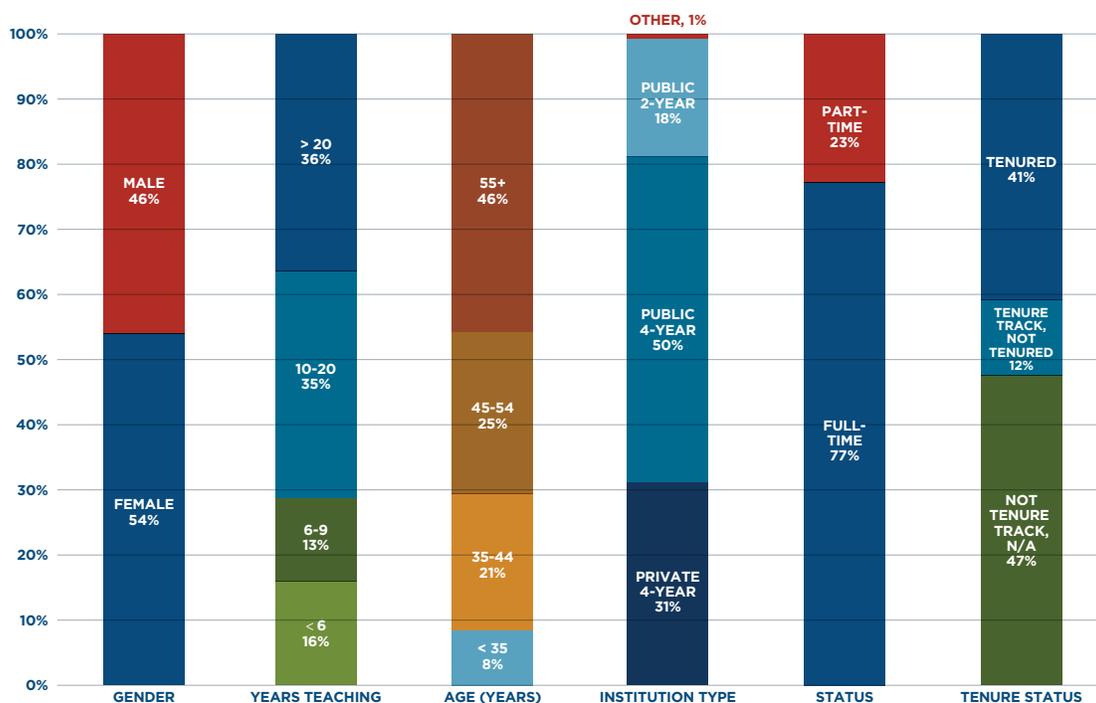
- What is your institutional or departmental strategy for courseware use? What objectives do you seek in the near, medium, and long term?
- How does this strategy align with your institution's mission?
- Have courseware suppliers' capabilities been closely aligned to your teaching and learning objectives?
- Does your institution or department encourage the use of digital courseware by faculty? How?
- Are there incentives in place for faculty to implement courseware? Are the incentives appropriate to compensate for the time required to use courseware effectively, and do they align with your courseware strategy and the objectives sought?
- Are there disincentives for courseware use present at your institution? Sources and types of disincentives may include:
 - At research institutions, prioritization of research over instruction, resulting in opposing demands on faculty time
 - At four-year institutions, social pressure against using courseware, stemming from tenure decisions or a need to identify with other faculty members in a department
 - At two-year institutions, a situation where instructors are faced with passing on courseware costs to students
- What changes can you make to better align incentives for faculty with institutional strategies?
- Do you have resources available to help alleviate the technical challenges that faculty may face when implementing courseware?
- What capacity and processes exist to ensure progress against institutional objectives for courseware use? Does your institution measure outcomes from courseware usage in timely and replicable ways?

The dynamic needs of postsecondary students, faculty, and institutions are mirrored in the diversity of available offerings in the courseware ecosystem. In our next issue brief, we will examine the evolution of courseware products that has led to today's expansive and diverse supplier landscape. To advance the category transformation, we will provide a product taxonomy to help institutions and education professionals sort through current courseware offerings.

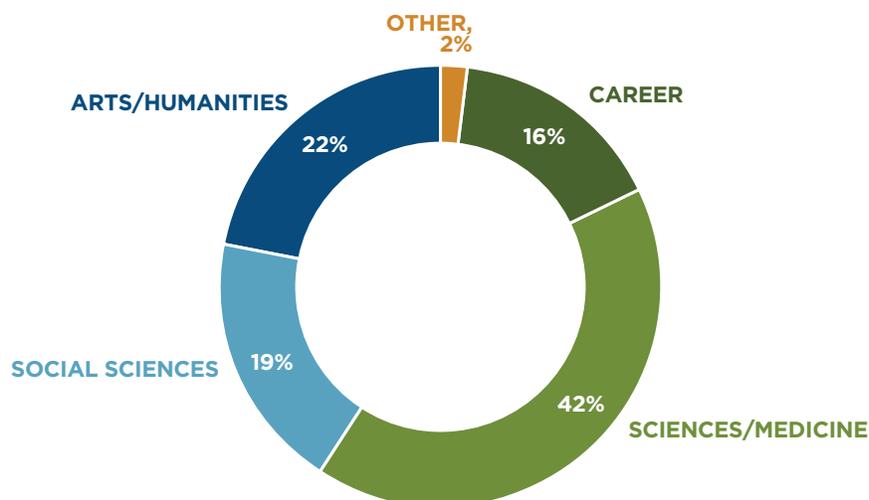
APPENDIX: OVERVIEW OF SURVEY RESPONDENTS

Our summer 2014 survey received over 2,700 responses from postsecondary faculty and administrators. The faculty sample was designed to be representative of national teaching faculty, where “teaching faculty” is defined as faculty who teach at least one course. The administrator sample was designed to collect perspectives from a range of roles, and targeted department chairs in high-enrollment disciplines. Below is a snapshot of the faculty and administrator respondents.

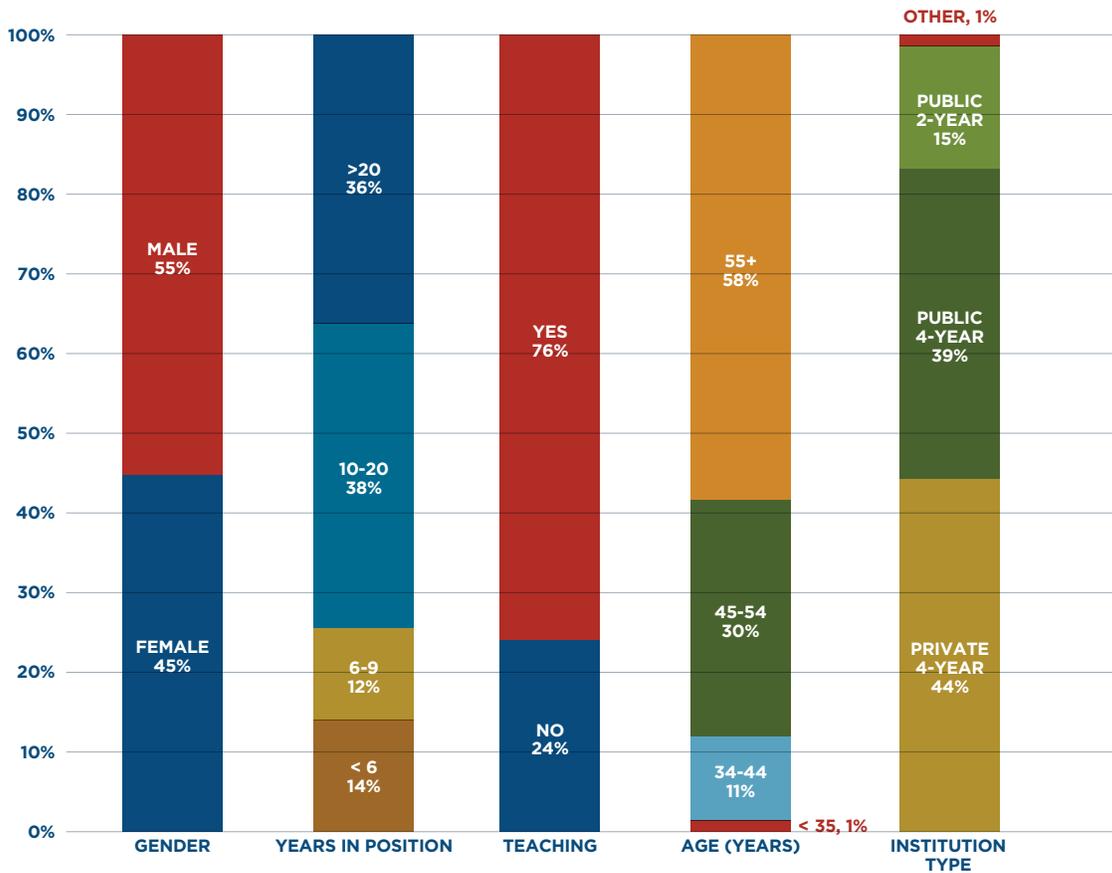
A total of 1,351 faculty responded to the survey. They are:



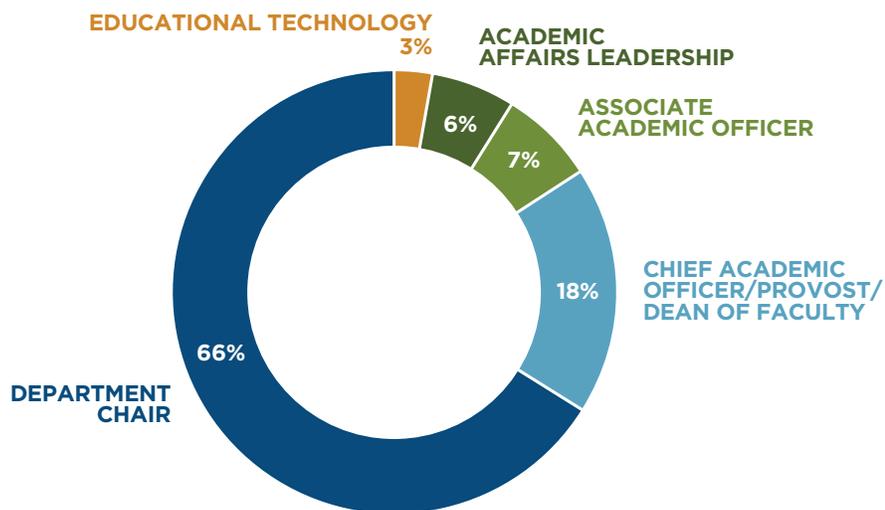
And they teach in the following disciplines:



A total of 1,405 administrators responded to the survey. They are:



And they hold the following positions:



ACKNOWLEDGMENTS

The papers in this series owe much to the support and engagement of a diverse group of individuals and organizations.

Fundamental to our research was the data collected from over 2,700 postsecondary faculty members and administrators through our surveys. We greatly appreciate the input of all our survey respondents, and their contribution to advancing the field's knowledge of digital courseware usage in postsecondary education.

We extend our gratitude to the individuals on our Institutional Advisory Panel, who provided input and feedback throughout our research and analysis process. The members of our Institutional Advisory Panel are:

- Kevin Bell, Executive Director of Curriculum Development and Deployment, College of Professional Studies, Northeastern University
- Dr. Meg Benke, Professor, School for Graduate Studies, Empire State College, State University of New York
- Dr. Christine Geith, Executive Director, MSUGlobal, Michigan State University
- Dale Johnson, Senior Business Analyst, Arizona State University
- Dr. Vince Kellen, Senior Vice Provost, Analytics and Technologies, University of Kentucky
- Dr. David Shulman, Campus President, Broward College Online – Florida's Global Campus

Thanks also to the Postsecondary Success team at the Bill and Melinda Gates Foundation for their support of this work. In addition, we thank our research partner, Babson Survey Research Group, for its expertise in the development and administration of our surveys and the analysis of data collected through those instruments. We also appreciate the work of Can of Creative, which helped us to execute our vision for this series.

Finally, any errors, omissions, or inconsistencies across this series are the responsibility of Tyton Partners alone.

BIOGRAPHIES

EMILY LAMMERS, *Principal*

Emily Lammers has spent the past five years working in the education sector, first analyzing investments in global education companies and more recently supporting the growth of domestic organizations as an Education Pioneers Analyst Fellow and in her strategy consulting work with Tyton Partners.

GATES BRYANT, *Partner*

Gates Bryant is a general manager and strategy consultant with a successful 15-year track record of bridging the gap between innovative strategy and practical execution, while serving in various strategy, product management, and operational roles in the education market. He joined Tyton Partners as a partner in 2011.

ADAM NEWMAN, *Managing Partner*

Adam Newman is a co-founder of Tyton Partners and has more than 15 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.

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 foundation of transactional and advisory experience and an extensive global network to make its clients' aspirations a reality and catalyze innovation in the sector.

For more information about Tyton Partners, visit tytonpartners.com or follow us at [@tytonpartners](https://twitter.com/tytonpartners).

This white paper, *Time for Class: Lessons for the Future of Digital Courseware in Higher Education* is the first of three publications in this area. The second publication will examine the evolution of courseware products that has led to today's expansive and diverse supplier landscape. To advance the category transformation, we will provide a product taxonomy to help institutions and education professionals sort through current courseware offerings.

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