ONLINE EDUCATION

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Executive Summary

Online learning has reached a tipping point in higher education. It has grown from a peripheral project of early tech adopters or a practice of the for-profit industry into an accepted way of delivering education that is now deeply embedded in the majority of colleges and universities.

In a March 2017 survey conducted for The Chronicle of Higher Education by Maguire Associates, 1,287 administrators involved in online learning and decisions about online learning reported on the growth of online education at their colleges and universities. The findings demonstrate the maturing of online education and how its positive effects have ramifications for the wider educational system.

Almost all institutions offer some form of online-only courses. Almost three-quarters of the administrators said online learning was critical to their institution's long-term strategic plan.

With that maturity comes an increased focus on quality. More than a third of institutions are using third-party organizations such as Quality Matters to vet their course quality. Quality Matters has more than 1,000 higher-education members, says Deb Adair, executive director of the group.

That focus on quality in online courses is having a wider effect in higher education, too, helping to positively influence the traditional face-to-face teaching. This survey showed online education is now constructively influencing instructors' teaching and the entire education offered at an institution.

Also, as online education matures, there is a growing understanding that developing and teaching an online-only class requires different skills than creating and teaching a face-to-face course. A majority of institutions have hired instructional designers to help create engaging online courses, although they remain a fairly a scarce resource on many campuses — half the institutions that have instructional designers employ merely one or two of them.

Faculty perceptions of online education are growing more positive, administrators believe. More than 70 percent of survey responders said faculty members' attitudes toward online learning have become more favorable or much more favorable in the past three years. That shift may be partially driven by younger faculty members more comfortable in online settings entering the professoriate.

A gap exists between public institutions and higher-priced private colleges and universities in adopting online learning. Fewer private colleges offer online-only classes. Fewer colleges and universities costing more than $40,000 a year offer online-only classes compared with lower-cost institutions. Administrators at these institutions are less likely to have taught online or taken an online course for credit than their counterparts at public and lower-cost institutions.

Looking ahead, almost three-quarters of administrators said they expect their institution's investment in online learning to increase in the next three years. Administrators' investment wish lists focus on improving the quality and experience of online courses: more instructional designers, paid training and professional development in online teaching for faculty members (as well as leave time for instructors to properly develop online courses), and more student support staff and systems.

Highlights
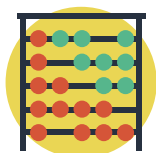
GROWING IN NUMBERS

Almost all colleges and universities now offer some form of online courses. The number of students studying online grew for most institutions over three years.
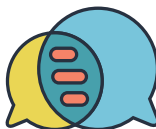
GROWING IMPORTANCE TO INSTITUTIONS

Two-thirds of administrators see online learning as a critical part of their mission and strategic plan. Two-thirds also expect spending for online learning to increase in the next three years.

GROWING ACCEPTANCE

Over two-thirds of administrators say faculty perceptions are becoming more positive. Younger faculty members and graduate students are especially open to teaching online, officials say. More than a third of administrators have hired staff or faculty members who have an online-only degree.

POSITIVE RIPPLE EFFECT

Online learning improves their institution's overall education and face-to-face teaching, administrators say. More than half of survey responders said it made their overall education stronger or much stronger. More than a third of administrators who teach online believe it greatly improved their teaching skills, and almost half thought it improved their skills somewhat.

MORE SUPPORT FOR INSTRUCTIONAL DESIGNERS

The use of instructional designers is becoming more common. Over half of the survey respondents said their institution plans on using instructional designers to revamp existing courses. Many responders put instructional designers high on their list of what they want to invest in.

FOCUS ON QUALITY

Many institutions are turning to third-party organizations to certify course quality. Quality Matters, the most prominent third-party organization, is seeing a growing interest in its certification process.

GAP BETWEEN PUBLIC AND HIGH-PRICED PRIVATE INSTITUTIONS

More public institutions have embraced online learning than high-cost private colleges. Ninety-eight percent of public institutions offer courses taught entirely online, compared with 89 percent of private institutions. Eighty-seven percent of public institutions say that the number of online students has increased in the past three years, whereas only 76 percent of private institutions have seen the number of online students go up.

Sixty-five percent of institutions that cost $40,000 or more offer courses taught entirely online, compared with 97 percent of those costing $20,000 to $29,000, and 93 percent of those costing $10,000 to $19,000.

Introduction

"Schools are now taking a different look at what it means to focus on learning outcomes and to try to understand what works and what doesn't, what does effective teaching mean, and how do you effectively use technology to change what you're doing in the classroom."

All signs point to the continuing and growing significance of online education in the years ahead, especially as the demographics of college students shift away from the traditional 18-year-old student toward older students who are working or raising families. More than one in four students — a total of 5.8 million students — took at least one distance education course in 2014, according to the Babson Survey Research Group's 2015 Survey of Online Learning. People are interested in teaching online, too. At Penn State's online World Campus, enrollment in the university's free online teaching courses for the Penn State community went up 30 percent from 2015 to the end of 2016.

Phil Hill, an ed tech market analyst and co-publisher of the *e-Literate* blog, sees a key change in attitudes toward online education: colleges, universities and their faculty members are now embracing online and hybrid learning and are figuring out how to redesign learning to suit online delivery.

"They're taking ownership and saying, 'We're going to get involved, we're not just going to relegate it to the continuing education department or one master's program,'" Mr. Hill says. "From that standpoint, I think the turning point is here."

"Schools are now taking a different look at what it means to focus on learning outcomes and to try to understand what works and what doesn't, what does effective teaching mean, and how do you effectively use technology to change what you're doing in the classroom," says Mr. Hill.

While online education differs from institution to institution, the sense that online education is here to stay is widespread. According to Mr. Hill, "It's no longer relegated to a side group. Now, the majority of people are dealing with it."

Online education is as varied as the wider field of higher education adopting it. Some institutions offer a few online courses, while others have full online campuses in addition to their physical campuses. Courses can either be synchronous, where all students are on the same schedule, or asynchronous, where students work at their own pace. There are hybrid courses that combine in-person and online work, and adaptive learning, which modifies the way course material is presented in a personalized response to individual students' performance.

Many faculty members and some administrators have been skeptical that online education could be as effective and engaging as traditional face-to-face learning. That skepticism still exists, but as online programs mature and institutions focus more on course quality, learning outcomes, and student engagement, those perceptions are shifting. Those who work in online education say that this is especially true for faculty members who try teaching online and take advantage of support in the form of instructional designers, faculty development training, or peer review systems.

Interest in having a third-party organization such as Quality Matters certify the quality of online courses is growing. Such certification has several benefits for institutions. Not only does it ensure that online courses are following best practices in online learning, it can give an institution a leg up in a crowded marketplace of online-education providers.

"The institutions who have been in the game for a while recognize that quality is one of the most potent marketing tools," says Lawrence B. Boggess, director of faculty development for Penn State World Campus. The online campus started in 1998 and has almost 1,800 students. "Quality really matters to people. It plays an important role in sustaining a mature online program."

Melody Buckner, director of digital learning and online education at the University of Arizona, says taking classes online offers more than convenience for today's students. Not only do they help students who might not otherwise be able to get to a campus to earn a degree (she herself earned her master's degree online from Northern Arizona University when she was home with young children), they help prepare students for the professional world, which now operates largely online and in digital spaces.

Investment is required. Ms. Buckner's office employs instructional designers and course support specialists, who all help faculty members teaching online to make their courses as good as possible. They offer support with designing courses, creating videos and graphics, and handling copyrights and making course materials accessible to all learners.

"In the end, that's our product, our teaching and learning experience," Ms. Buckner says. "I want to be able to put out the best product. That's the return on investment. If we can create an engaging learning experience, I think it's worth going the extra mile and worth the extra money."

Growth

Almost all of the survey responders — 94 percent — said their institution currently offered courses taught entirely online. Another 3 percent said their institutions planned to offer online courses sometime in the future. Only 3 percent said their institution had no plan to offer courses taught entirely online.
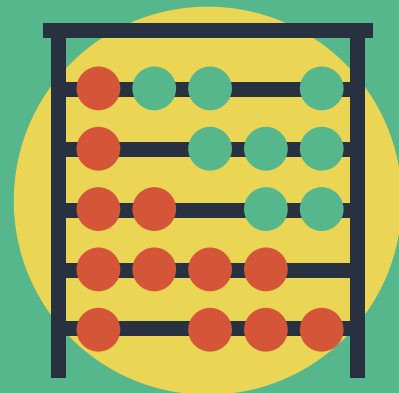
Online education is now embedded in mainstream higher education. The survey showed online education growing in several ways: in the number of students, the number of institutions offering online courses, and in importance and acceptance on campuses.

Few institutions offer no online learning opportunities. Almost all of the survey responders — 94 percent — said their institution currently offered courses taught entirely online. Another 3 percent said their institutions planned to offer online courses sometime in the future. Only 3 percent said their institution had no plan to offer courses taught entirely online. (See **Figure 1.**)

FIGURE 1
THE VAST MAJORITY OF INSTITUTIONS OFFER CLASSES TAUGHT ENTIRELY ONLINE

Yes	94%
No	3%
No, but plan to in the future	3%
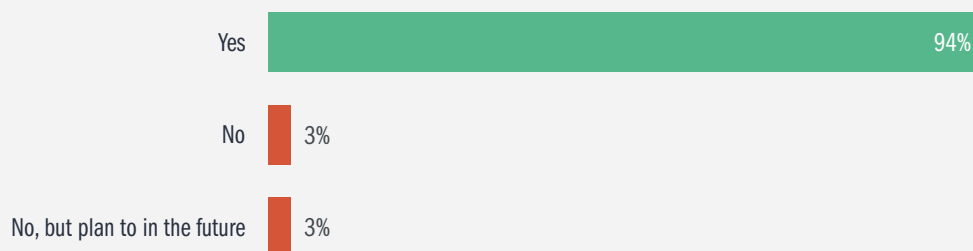
The number of students taking online courses has grown over the past three years as well. Compared with three years ago, a large majority of responders — 82 percent — said the number of students taking classes online has increased. For 15 percent, the number of students taking online classes had stayed the same. A small minority — 3 percent — said the number of students had declined over that time period. (See **Figure 2.**)

FIGURE 2
THE NUMBER OF STUDENTS IN ONLINE CLASSES HAS INCREASED AT MOST INSTITUTIONS

Increased	82%
Stayed the Same	15%
Decreased	3%
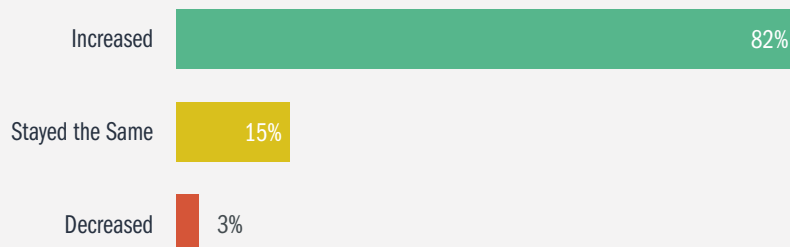
The growing popularity of online education is especially pronounced at public colleges and universities. Ninety-eight percent of public institutions offer courses taught entirely online, compared with 89 percent of privates. Eighty-seven percent of public institution responders reported the number of students in their online courses had increased, whereas only 76 percent of private institutions saw an increase. (See **Figure 3.**)

At the University of Arizona, online distance education represents access for students in rural communities who otherwise could not get to the main or branch campuses, says Ms. Buckner, who is an interim dean in addition to her duties as director of digital learning and online education. That outreach is part of the university's land-grant mission.

When Ms. Buckner started at Arizona eight years ago, online learning was a small part of what the university offered. Three years ago, the university made it more of a central strategic initiative. The university now has UA Online, a fully online campus, as well as online courses for residential students called iCourses. Those iCourses have proved to be more popular than university leaders had expected, Ms. Buckner says.

Arizona is far from the only university where online learning has gained prominence and importance. The survey showed online learning was a critical part of their institution's long-term plan for 68 percent of respondents. Another 28 percent said online was somewhat critical to the overall mission, while only 4 percent said it was not at all important to their institution's mission. (See **Figure 4.**)

FIGURE 3
PUBLIC INSTITUTIONS OFFER MORE ONLINE CLASSES AND HAVE SEEN INCREASED ONLINE ENROLLMENT

Yes, we currently offer courses taught entirely online	89% (Private) / 98% (Public)
Compared with three years ago, the number of students in our online classes has increased	76% (Private) / 87% (Public)

● PRIVATE INSTITUTIONS ● PUBLIC INSTITUTIONS
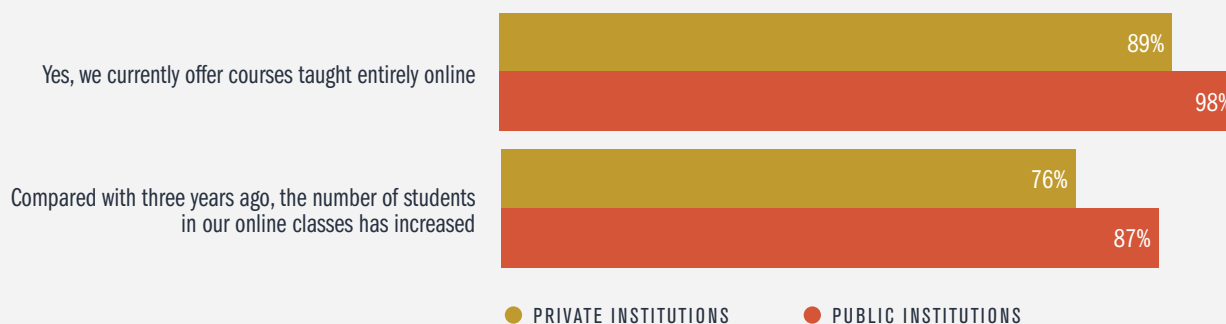
FIGURE 4
PERCENTAGE OF ADMINISTRATORS WHO BELIEVE ONLINE LEARNING IS A CRITICAL PART OF THEIR INSTITUTIONS' STRATEGIC PLAN

Increased	68%
Stayed the Same	28%
Decreased	4%
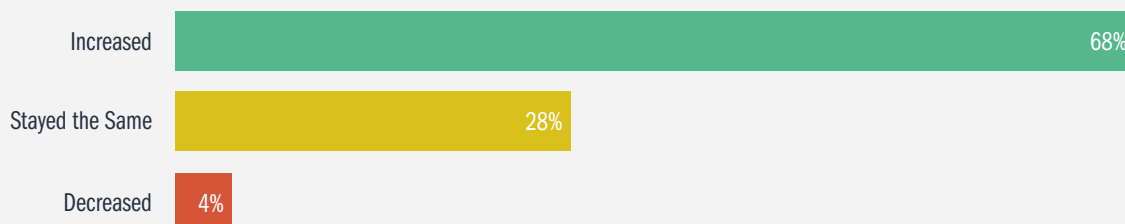
Especially at public and lower-cost institutions, online learning has become critically important. Almost three-quarters of respondents at public colleges and universities — 72 percent — say that online learning was "definitely" critical to their institution's long-term plan. (See **Figure 5.**)

Among colleges and universities costing less than $30,000 a year, 69 percent of institutions in the $20,000 to $29,999 range and 64 percent of those costing between $10,000 and $19,999 said online learning was critical to their long-range plans. (See **Figure 6.**)

FIGURE 5
ONLINE LEARNING IS A STRATEGIC INITIATIVE IN MORE PUBLIC INSTITUTIONS THAN PRIVATE INSTITUTIONS

Yes, we definitely feel that online learning is a critical part of our strategic plan

62%

72%

● PRIVATE INSTITUTIONS   ● PUBLIC INSTITUTIONS

FIGURE 6
ONLINE LEARNING IS A CRITICAL PART OF THE STRATEGIC PLAN AT MORE LOWER-COST INSTITUTIONS THAN HIGH-COST INSTITUTIONS

Yes, we definitely feel that online learning is a critical part of our strategic plan

64%

69%

54%

39%

● INSTITUTIONS THAT COST $10,000 TO $19,000   ● INSTITUTIONS THAT COST $20,000 TO $29,000   ● INSTITUTIONS THAT COST $30,000 TO $39,999   ● INSTITUTIONS THAT COST $40,000 OR MORE
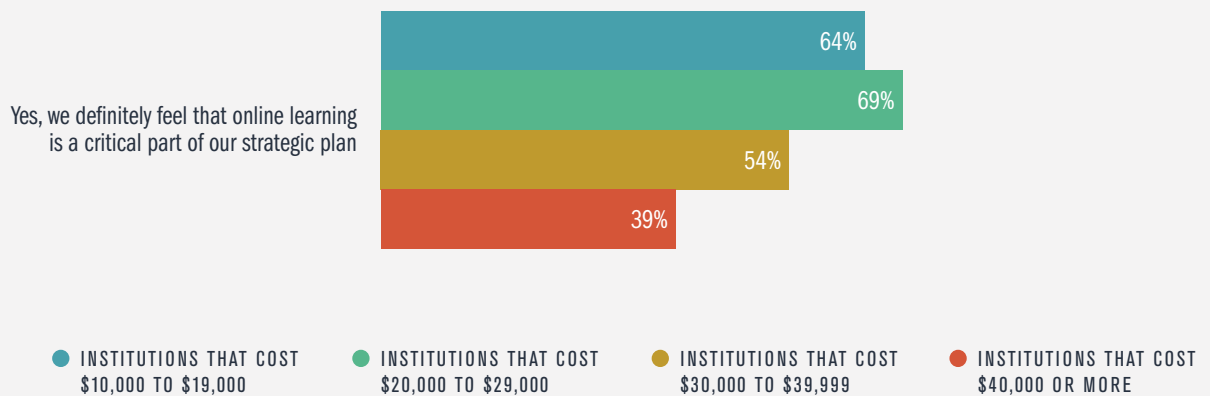
Top reasons for investing in online education, according to respondents, were current trends in curriculum and instruction (76 percent); increased enrollment (73 percent); current student behavior and practices (66 percent); and revenue generation and positive impact on student success (both 59 percent). (See **Figure 7.**)

FIGURE 7
FACTORS INFLUENCING DECISIONS TO INVEST IN ONLINE EDUCATION

Factor	Percentage
Current trends in curriculum & instruction	76%
Increased enrollment	73%
Current student behaviors/practices	66%
Positive impact on student success	59%
Revenue generation	59%
Faculty support within institution	53%
Service and reputation of platform/provider	23%
Reduction of institutional costs	20%
Other	10%
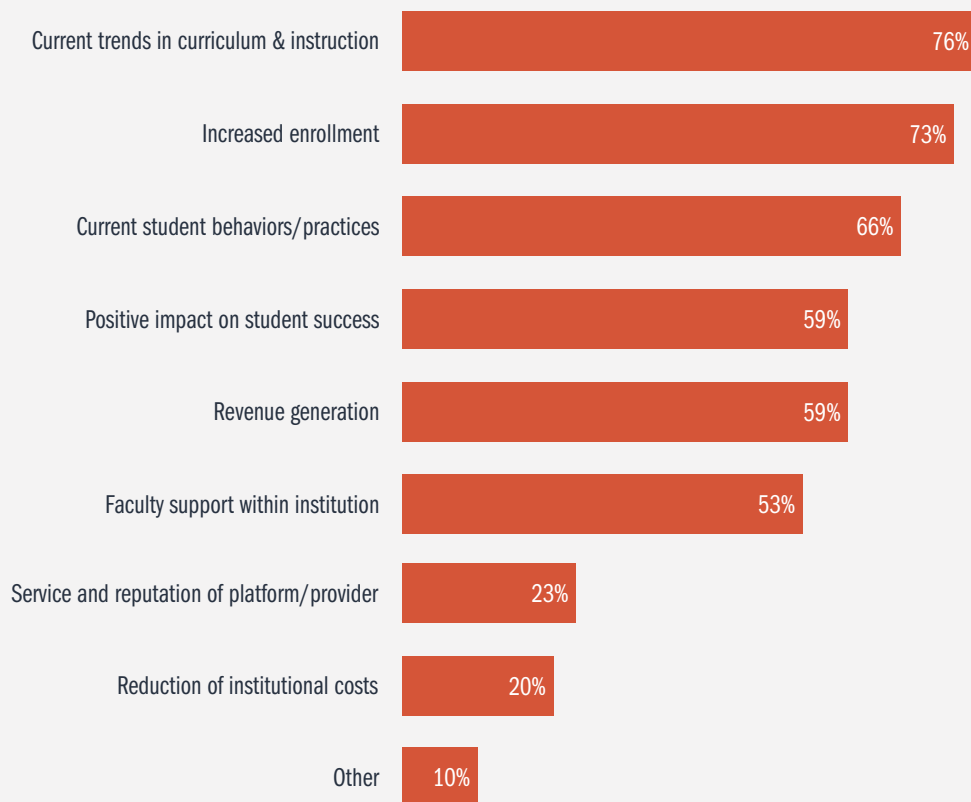
This growth seems likely to continue. Almost three-quarters of administrators — 72 percent — said they expected spending for online initiatives to increase at their institution in the next three years. Only 1 percent thought it would decrease. (See **Figure 8.**)

FIGURE 8
SPENDING EXPECTATIONS FOR ONLINE INITIATIVES

● INCREASE   ● REMAIN THE SAME   ● DECREASE   ● I DON'T KNOW
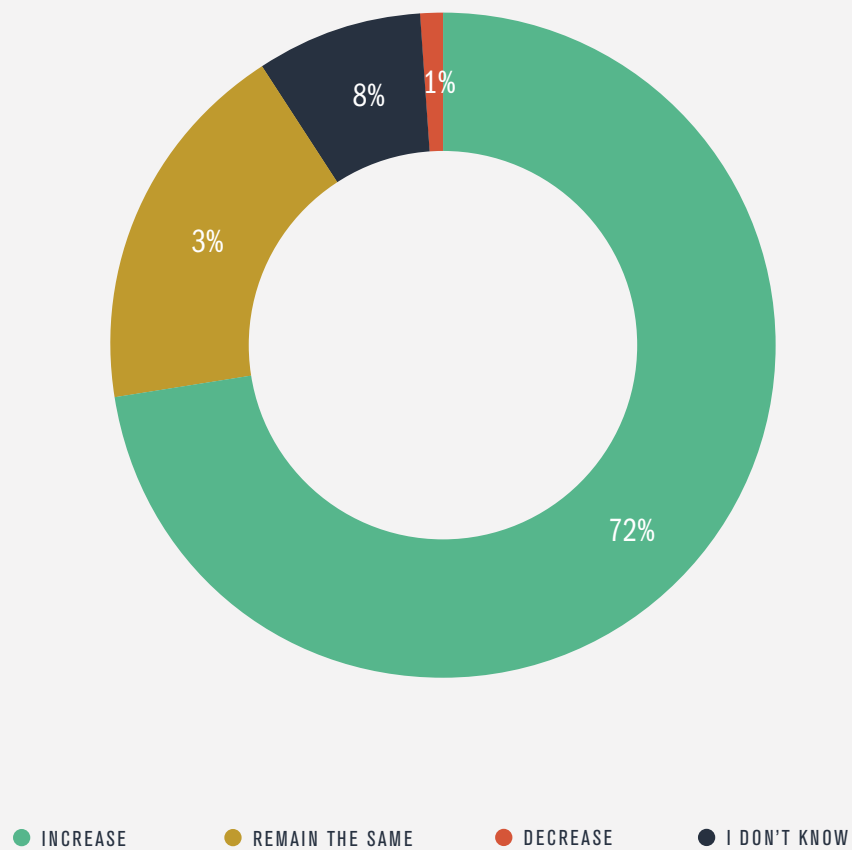
Specifically, institutions plan to continue or increase investments in these areas: using instructional designers to revamp existing courses (59 percent); creating new online-only degree programs (56 percent); and building e-advising capabilities (39 percent). Twenty percent of responders said they were planning to add a competency-based education program. (See **Figure 9.**)

FIGURE 9
AREAS WHERE INSTITUTIONS PLAN TO CONTINUE OR INCREASE INVESTMENTS

Using instructional designers to revamp existing courses	59%
Creating a new online-only degree program	56%
Building e-advising capabilities	39%
Implementing a new learning management system	23%
Adding a primarily or entirely competency-based program	20%
Other	6%
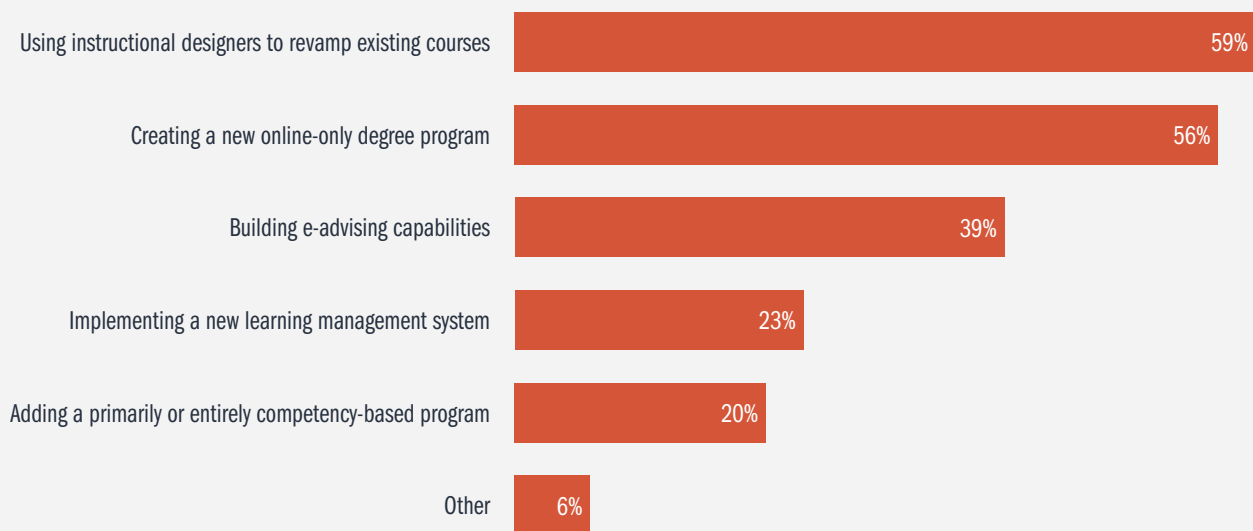
Growing Acceptance

"There seems to be a
growing desire among
faculty to at least figure
out what it means to
teach online."

Along with growth comes an increasing acceptance of online learning. A large number of administrators surveyed — more than 70 percent — believe that faculty members' attitudes toward online learning have become more favorable or much more favorable in the past three years. A quarter reported faculty attitudes remaining the same, and three percent said those attitudes had become less favorable. (See **Figure 10.**)

Mr. Hill, the ed tech market analyst, sees a growing interest and curiosity from faculty members about teaching online when he gives workshops as a consultant. "There seems to be a growing desire among faculty to at least figure out what it means to teach online," Mr. Hill says.

Their interest is not without a healthy dose of skepticism. The greatest barrier to faculty acceptance of online education, he says, is when administrators, vendors, or other groups such as foundations over-promise what online education can do. For example, the initial hype surrounding MOOCs as an innovation that would make over higher education did not come to pass (though its proponents say there have been positive effects).

Changing demographics of faculty members also has an effect. Mr. Boggess, the director of faculty development for Penn State World Campus, has seen a strong and growing interest from faculty, especially those in the first-third of their career, in teaching courses that are fully online.

"They're more comfortable in the online setting," Mr. Boggess says. "They may have even taught online and many of them have actually taken courses online. They tend to not have some of the resistance."

FIGURE 10
FACULTY MEMBERS' ATTITUDES HAVE BECOME MORE FAVORABLE

Much more favorable	More favorable	Stayed the same	Less favorable
6%	65%	26%	3%
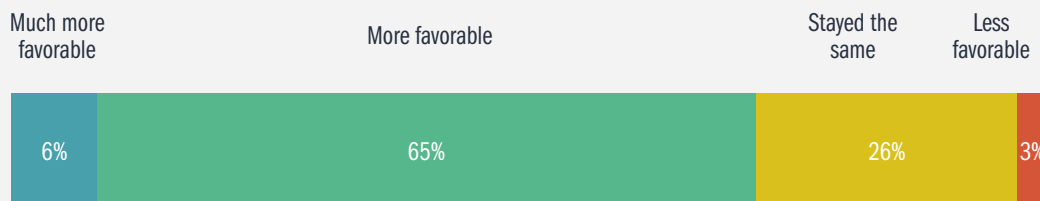
Mr. Boggess's department offers classes and certificates in teaching online, and interest, especially from graduate students, has been very strong. In 2015, World Campus offered for the first time an online teaching certificate specifically for Penn State graduate students that focused on learning and teaching theories in order to prepare them for teaching careers that will likely include teaching online. Interest from graduate students was high. Three hundred and fifty students signed up, and 250 completed the free five-week course, Mr. Boggess says. Last year, 200 signed up and 160 finished the program.

Another sign of online education's growing acceptance in higher education is the hiring of employees with degrees earned entirely online. According to the survey, 38 percent of administrators had hired either faculty members or staff or a combination of both with online-only degrees. However, the same amount — 38 percent — had not hired a faculty or staff member with an online degree. Twenty-four percent said they didn't know. (See **Figure 11.**)

FIGURE 11
PERCENTAGE OF ADMINISTRATORS WHO HAVE HIRED FACULTY OR STAFF WITH ONLINE-ONLY DEGREES

Category	Percentage
No	38%
Yes, faculty & staff	20%
Yes, faculty	10%
Yes, staff	8%
Don't know	24%
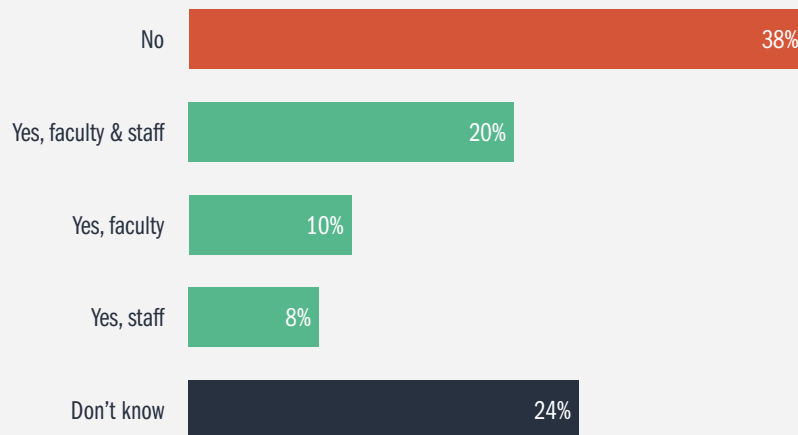
Focus on Quality

Eighty-six percent
said their institutions
had enrollment
caps and an internal
process to review
course quality.

Much of the early criticism of online programs arose from the concern that they were not as high quality as face-to-face instruction. But as online education matures, there is a growing emphasis on quality and on ensuring that students have a positive experience that engages them and teaches what they are supposed to learn.

Most of the administrators surveyed — 86 percent — said their institutions had enrollment caps and an internal process to review course quality.

More than one-third of administrators surveyed — 36 percent — said their institution was using an outside organization to vet the quality of online courses. Of those, 80 percent are using Quality Matters. (See **Figures 12 and 13**.)

FIGURE 12
PERCENTAGE OF INSTITUTIONS THAT USE AN OUTSIDE ORGANIZATION TO VET ONLINE COURSE QUALITY

- YES
- NO
- I DON'T KNOW

36%

48%

16%
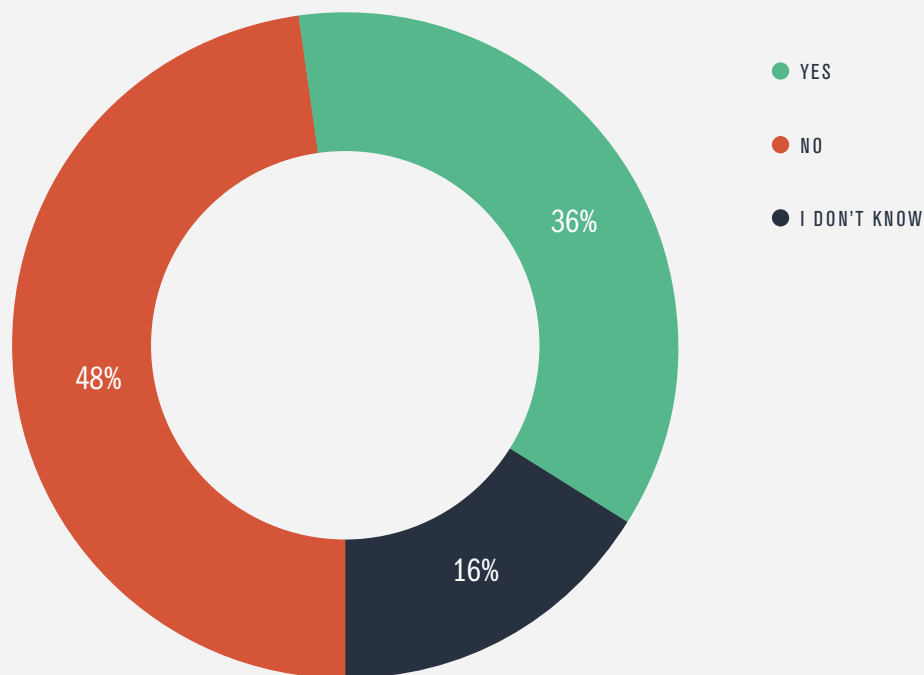
FIGURE 13
WHICH ORGANIZATIONS ARE USED

QUALITY MATTERS — 80%
ONLINE LEARNING CONSORTIUM — 11%

TOC »
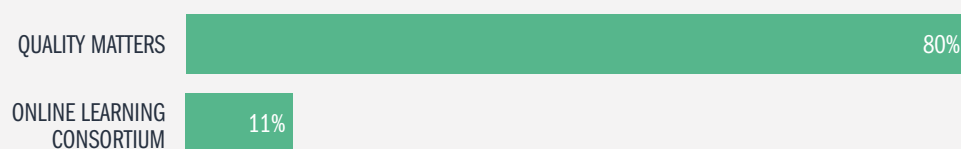
Quality Matters provides tools about best practices and learning outcomes to universities setting up online programs and also certifies the quality of online courses.

Since Quality Matters began, it has seen growth in its membership numbers (currently more than 1,000) and its pool of certified faculty peer reviewers, who evaluate online courses (currently about 3,500), says Deb Adair, the group's executive director. The organization has certified about 5,500 higher-education courses.

That external certification is where Quality Matters is seeing the most interest, says Ms. Adair. "The demand for that is growing faster than any of our other services." Experts say one reason for that may be that external certification can help a university position itself in a competitive marketplace.

Use of Instructional Designers

Almost two-thirds of respondents (65 percent) said their institutions employed dedicated instructional designers.

One major contribution to improved quality in online education is the use of instructional designers in course creation. What was relatively rare in the early days of online education is now much more commonplace.

Survey results back this up. Almost two-thirds of respondents (65 percent) said their institutions employed dedicated instructional designers. Of the 31 percent who did not, 16 percent said their college or university planned to hire them in the near future. (See **Figure 14.**)

FIGURE 14
USE OF INSTRUCTIONAL DESIGNERS

INSTITUTIONS THAT HIRE DEDICATED INSTRUCTIONAL DESIGNERS

4%
31%
65%

PLANS TO HIRE IN THE NEAR FUTURE

16%
49%
35%

● YES   ● NO   ● I DON'T KNOW

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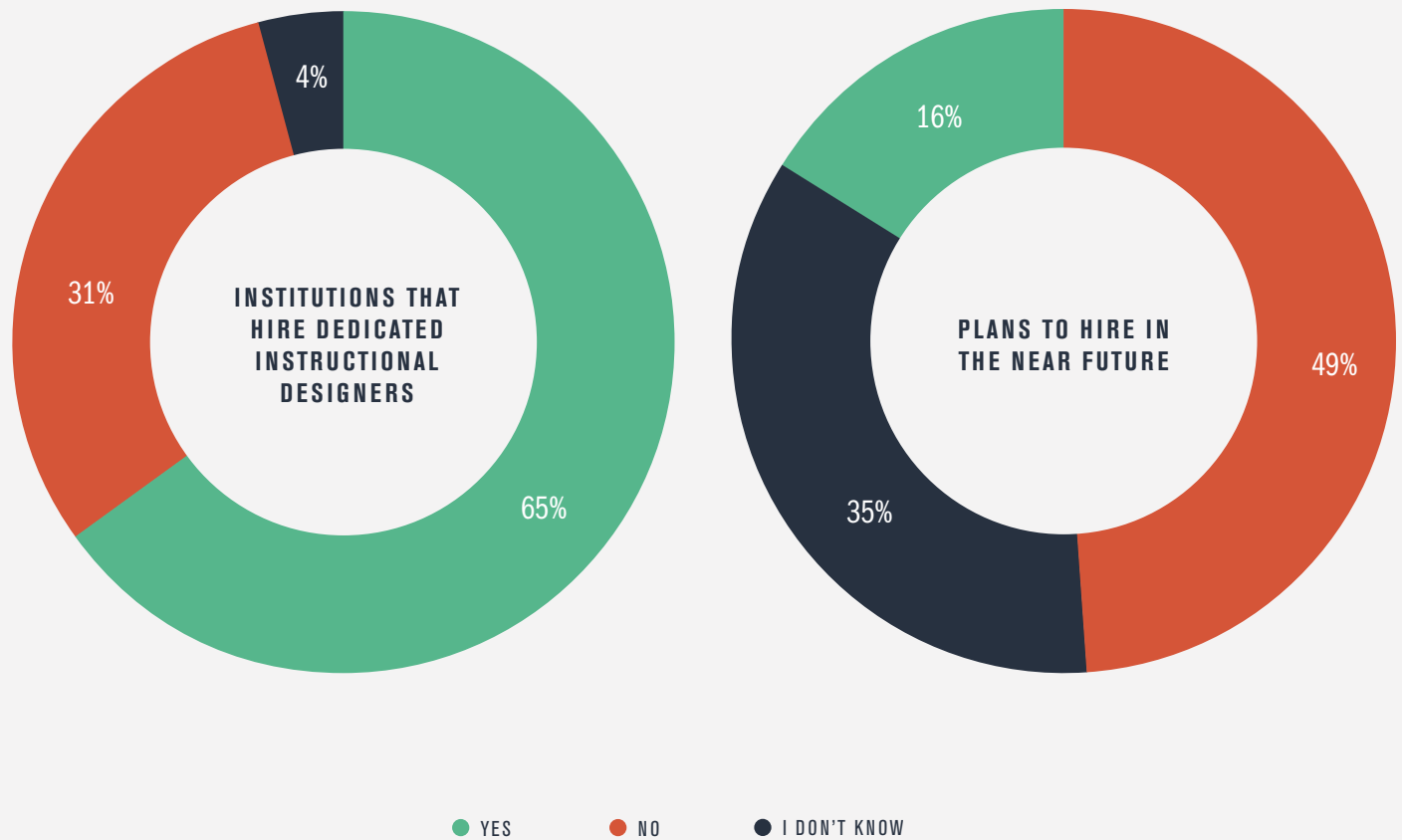
Public institutions tended to employ a higher number of instructional designers than private institutions. (See **Figure 15.**)

FIGURE 15
PUBLIC INSTITUTIONS TEND TO EMPLOY MORE INSTRUCTIONAL DESIGNERS THAN PRIVATE INSTITUTIONS

More than 10 instructional designers employed
- 3%
- 10%

Six to ten instructional designers employed
- 8%
- 10%

Three to five instructional designers employed
- 29%
- 36%

One to two instructional designers employed
- 60%
- 44%

● PRIVATE INSTITUTIONS   ● PUBLIC INSTITUTIONS
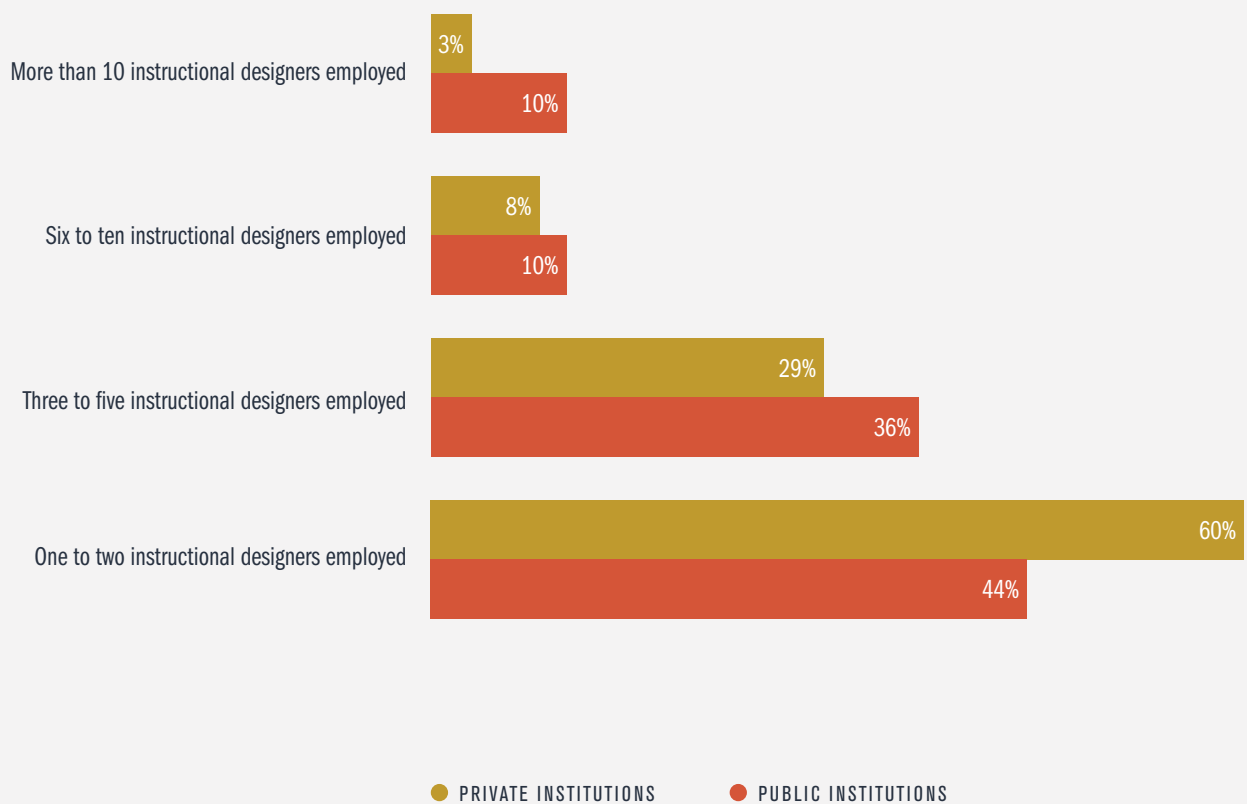
At the University of Arizona, six instructional designers are employed in Ms. Buckner's office, and another four or five work within the university's schools of business, education, law and nursing. "These deans value the online experience," notes Ms. Buckner.

In her experience, she says, there is a noticeable difference between a course that an instructional designer has worked on, in the quality of the graphic design and videos and engagement opportunities for students, and a course created without that help.

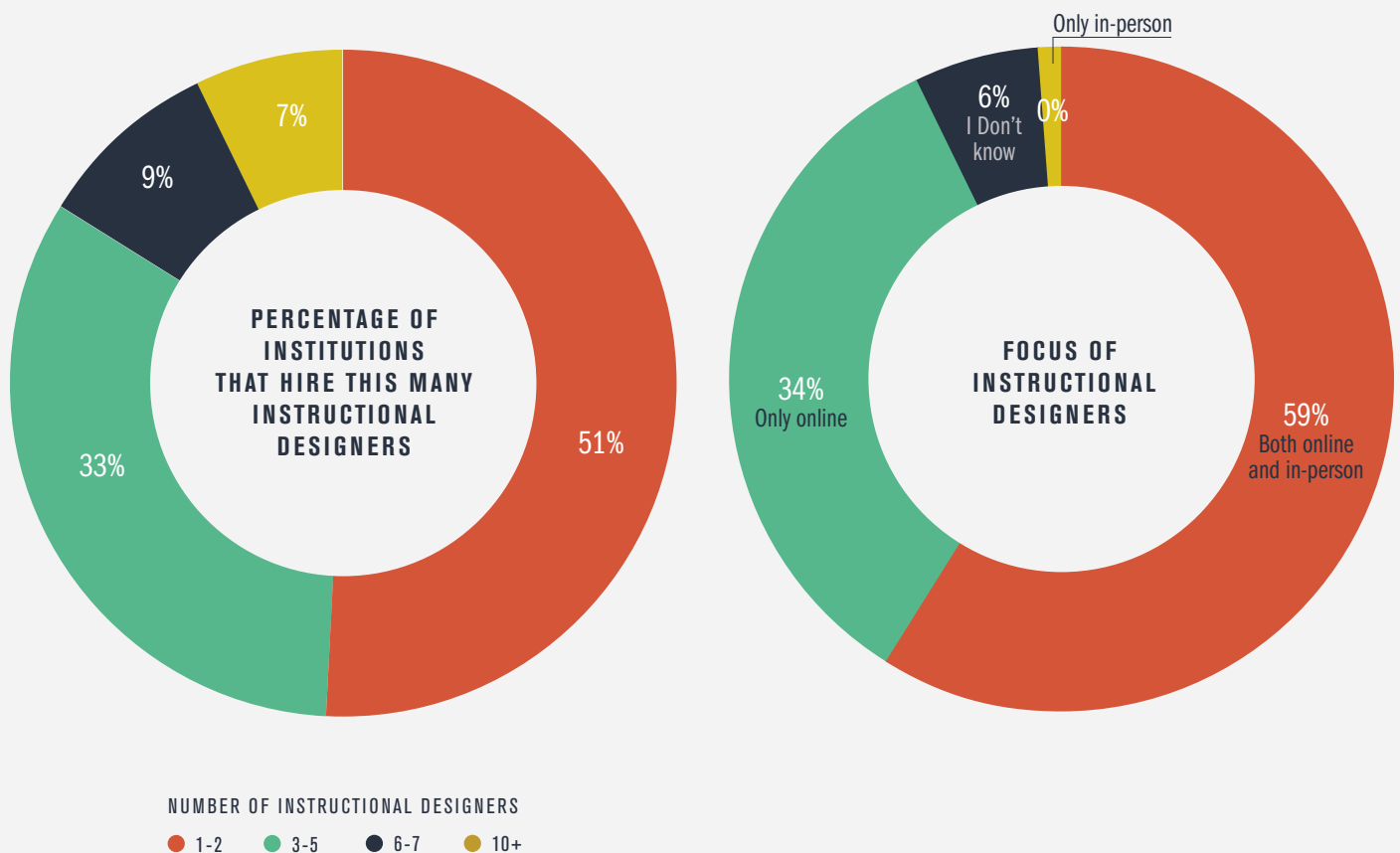That number of instructional designers would be a luxury at many universities. According to the survey, 51 percent of institutions employed one to two designers, while 33 percent employed three to five. Nine percent had six to 10 and 7 percent had more than 10. Only 34 percent of institutions with instructional designers had them working only on online courses; most assisted in designing in-person courses as well. (See **Figure 16.**)

FIGURE 16
THE NUMBER AND FOCUS OF INSTRUCTIONAL DESIGNERS

PERCENTAGE OF INSTITUTIONS THAT HIRE THIS MANY INSTRUCTIONAL DESIGNERS

7% · 9% · 33% · 51%

Only in-person

FOCUS OF INSTRUCTIONAL DESIGNERS

6% I Don't know · 0% · 34% Only online · 59% Both online and in-person

NUMBER OF INSTRUCTIONAL DESIGNERS
● 1-2 ● 3-5 ● 6-7 ● 10+

"Now, it's rare when I talk to institutions that they don't have any instructional design support," says Ms. Adair of Quality Matters, which has an instructional designers association. However, that doesn't always mean that instructional designers are readily available to all who would like to work with one, she said.

One indication of the desire and need for instructional designers was administrators' response to a survey question: If you had an unlimited budget and time, how would you like to see your institution approach online education? More than a hundred responded they would like to hire more instructional designers. It was by far the most common refrain:

> **"I would add more instructional designers. We really don't have enough staff in comparison to the numbers of courses we are putting online."**

> **"Although we use Quality Matters and review courses prior to being taught online, I would like to hire online course designers to ensure continuity in course offerings."**

> **"Hire instructional designers to work with each department to enhance the quality of online courses and relieve some of that pressure from faculty."**

> **"Heavily invest in instructional designers and course assistants to manage online courses."**

Using instructional designers is often voluntary on campuses, but faculty members see value in instructional design and often use the support, Ms. Adair says. One cultural shift she has noticed over time is the relationship between instructional designers and faculty members. Where once they tended to be wary of each other, now she sees a mutual respect for the different skill sets each brings to online education, as well as a deepening understanding from faculty members that developing an online course is different than creating a face-to-face one.

"Getting support is no admission of inability to teach," Ms. Adair says.

Positive Ripple Effects

A majority of respondents believe online learning has strengthened their institution's overall education.

Improvements in online education may be affecting other parts of the university.

The survey showed a majority of respondents believe online learning has strengthened their institution's overall education. Fifty-two percent said it made their overall education stronger. An additional 12 percent said online learning made it "much stronger." Twenty-eight percent said it made it the same, while 4 percent said online learning made their overall education weaker. (See **Figure 17.**)

FIGURE 17
MOST RESPONDENTS BELIEVE ONLINE EDUCATION HAS STRENGTHENED THEIR INSTITUTIONS

I Don't Know	Much stronger	Stronger	Same	Weaker
4%	12%	52%	28%	4%
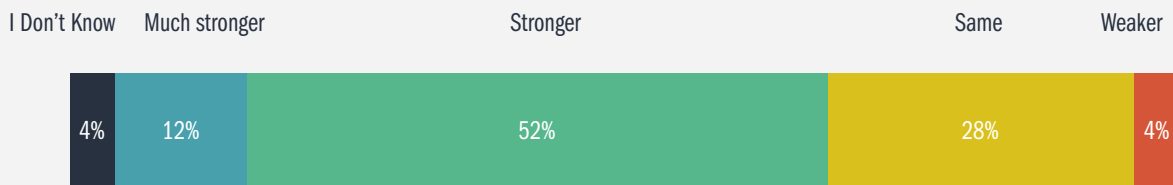
For those administrators who have taught online, a majority said teaching online improved their overall teaching skills. More than a third — 39 percent — said it had greatly improved their teaching skills, while almost half — 48 percent — thought it improved their skills somewhat. A small minority — 10 percent thought it made no difference at all. Three percent thought it made their teaching skills worse. (See **Figure 18.**)

FIGURE 18
ADMINISTRATORS BELIEVE ONLINE TEACHING HAS IMPROVED THEIR TEACHING SKILLS

Greatly	Somewhat	Minimally	Not at all
39%	48%	10%	3%

Mr. Boggess, the director of faculty development at Penn State World Campus, says faculty members who go through online teaching training say they feel more competent and confident. Teaching online requires things that are universal to good teaching — planning ahead, anticipating student reactions and needs, and being precise and clear. That carries over into the classroom.

"It's a common 'a-ha' moment," says Mr. Boggess, who teaches both online and face-to-face courses. "Afterward, the feeling is, 'I'm just a better teacher in general, and I like teaching more.'"

TOC »

The High-Priced Private Gap

Almost one-third of colleges costing more than $40,000 — 29 percent — said they had no plans to begin offering courses taught entirely online.
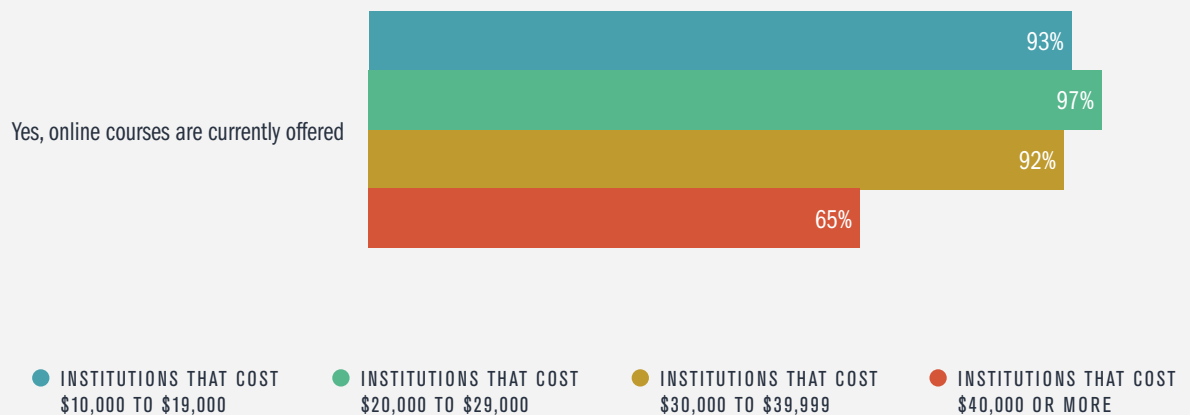
Not every university or college has fully embraced online learning. In the survey, a gap emerged between the public and lower-cost institutions and the higher-priced privates.

Fewer high-priced institutions — colleges costing $40,000 or more a year — offer courses taught entirely online than their lower-cost counterparts. Sixty-five percent of those institutions offered courses taught entirely online, according to the survey. (See **Figure 19.**)

This gap looks like it will continue. Almost one-third of colleges costing more than $40,000 — 29 percent — said they had no plans to begin offering courses taught entirely online. In contrast, only 2 percent of institutions costing less than $40,000 said they had no plans to offer courses taught entirely online.

FIGURE 19
FEWER HIGH-PRICED INSTITUTIONS OFFER ONLINE COURSES

Yes, online courses are currently offered

- 93%
- 97%
- 92%
- 65%

● INSTITUTIONS THAT COST $10,000 TO $19,000
● INSTITUTIONS THAT COST $20,000 TO $29,000
● INSTITUTIONS THAT COST $30,000 TO $39,999
● INSTITUTIONS THAT COST $40,000 OR MORE

High-cost privates seem more accepting of hybrid or blended classes. Currently, 77 percent of institutions costing more than $40,000 offer courses that combine online and face-to-face elements. Another 11 percent plan to sometime in the future, while 11 percent have no plans to offer hybrid or blended courses. For lower-cost colleges, 92 percent offer hybrid courses and only 2 percent have no plans to do so.

Of the higher-priced privates, 37 percent said they planned to invest in creating a new online-only degree program, compared with close to or just over 60 percent for lower-cost institutions. (See **Figure 20**).

FIGURE 20
THE NUMBER OF INSTITUTIONS PLANNING TO INVEST IN A NEW ONLINE-ONLY DEGREE PROGRAM
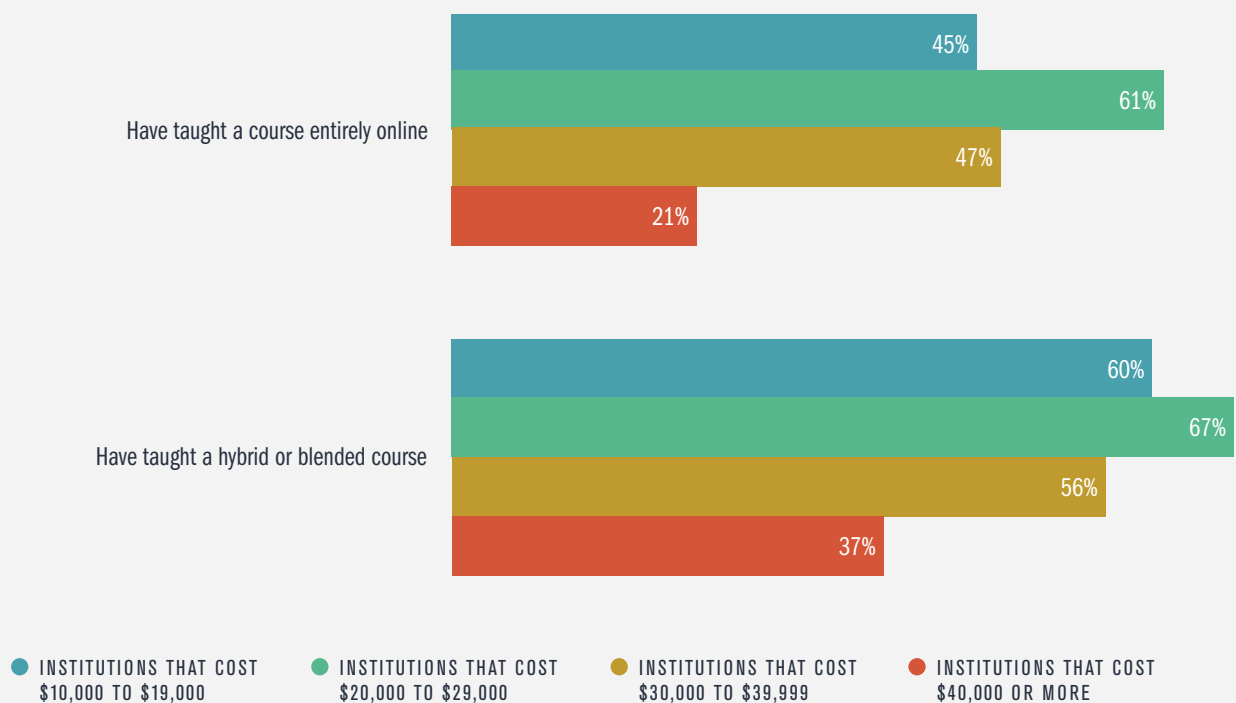
Creating a new online-only degree program

- 58%
- 63%
- 61%
- 37%

● INSTITUTIONS THAT COST $10,000 TO $19,000

● INSTITUTIONS THAT COST $20,000 TO $29,000

● INSTITUTIONS THAT COST $30,000 TO $39,999

● INSTITUTIONS THAT COST $40,000 OR MORE

There may be several reasons for this gap. Mr. Hill, the market analyst, suggested that private institutions already tend to have a classroom model that online education is shooting for — smaller class sizes and more personalized classroom experiences. They may not have as large a need to redo a course style like the large introductory lecture.

Administrators at the most expensive colleges don't have as much direct exposure to online education, either. Administrators in these institutions are much less likely to have taught an online-only or hybrid course than administrators at lower-cost institutions. They are also less likely to have taken an online or hybrid course for credit than their counterparts at lower-cost institutions. (See **Figure 21.**)

FIGURE 21
ONLINE TEACHING EXPERIENCE TENDS TO DECREASE IN HIGHER-PRICED INSTITUTIONS

Have taught a course entirely online
- 45%
- 61%
- 47%
- 21%

Have taught a hybrid or blended course
- 60%
- 67%
- 56%
- 37%

● INSTITUTIONS THAT COST $10,000 TO $19,000
● INSTITUTIONS THAT COST $20,000 TO $29,000
● INSTITUTIONS THAT COST $30,000 TO $39,999
● INSTITUTIONS THAT COST $40,000 OR MORE

Broken down by sector, administrators at two-year public colleges — typically the lowest-cost institutions — were the most likely to have taught an online course or taken a fully online or hybrid course. At community colleges, 66 percent of administrators had taught online compared with 47 percent of four-year public administrators and 53 percent of four-year private administrators. The gap was even bigger in regard to who had taken online courses for credit. While 67 percent of two-year public administrators had done so, only 37 percent of four-year private administrators and 30 percent of four-year public administrators had that experience. (See **Figure 22.**)

Administrators at high-cost institutions have a less rosy view of online education than their counterparts at lower-cost institutions. When asked if they considered courses taught either partially or fully online to be of equal educational value to ones taught in a classroom, 34 percent said they disagreed or disagreed strongly. For lower-cost institutions, that number was 19 percent. The gap also existed for those who strongly agreed that the forms were equal: 19 percent of administrators at high-cost institutions compared to 31 percent at lower-cost colleges and universities.

FIGURE 22
THE GAP BETWEEN HIGH- AND LOW-COST INSTITUTIONS

	Institutions that cost less than $40,000	Institutions that cost $40,000 or more
Have never hired anyone as faculty or staff with a degree earned entirely online	39%	58%
Do you expect spending on online-learning initiatives to change in the future INCREASE	79%	55%
Do you expect spending on online-learning initiatives to change in the future REMAIN THE SAME	14%	34%
A course taken partially or fully online provides an equal educational value AGREE OR STRONGLY AGREE	78%	58%
A course taken partially or fully online provides an equal educational value DISAGREE OR STRONGLY DISAGREE	19%	34%
Have you ever taken an online or hybrid course for credit YES	36%	13%
Have you ever taken an online or hybrid course for credit NO	64%	87%
Have you ever taught a course entirely online YES	52%	21%
Have you ever taught a course entirely online NO	48%	79%

● INSTITUTIONS THAT COST LESS THAN $40,000   ● INSTITUTIONS THAT COST $40,000 OR MORE

Conclusion

It has been clear for some time that online education is not a fad. While different types of online learning, like MOOCs, may not live up to their initial hype, online education — that is, distance learning delivered digitally, whether for an entire course or part of one — is not going away. A majority of colleges and universities understand this and are working to find the best online learning solutions for their students and faculty members.

The world continues to head in this direction. Changing demographics and needs of college students, the expectations of students who have grown up online, and the increasingly digital professional world all require that higher education move in this direction, as well.

Going forward, quality will be key. Badly done online education is harmful to students and to an institution's reputation. Many people working in the field already understand the focus on quality is essential to the success and longevity of online education.

"If done well, online education can be very powerful," one administrator said in response to the survey. "But if not adequately supported, it is no better than a correspondence course." Another warned that if done poorly or haphazardly, it can increase faculty skepticism, which then turns into cynicism. That kind of cascading negative effect can seriously harm the long-term success of a college's or university's online endeavors.

Clearly, then, the current attitude toward quality certification is a positive one. The survey finding that more than a third of institutions are using outside organizations to vet course quality is significant, says Mr. Hill, the ed tech consultant. Using quality rubrics forces people to grapple with big questions: What does quality mean? What is good design for a course? What do students need?

Once you start thinking about that concept of using quality rubrics and using peer review, then there's no reason they can't be applied to hybrid courses or even… to face-to-face courses," Mr. Hill says.

More good could be done in offering faculty members a community of practice where members can exchange ideas and stories of what worked for them teaching online and what didn't, Mr. Hill says. In the workshops he offers as a consultant, Mr. Hill sees faculty members interested in hearing about the experiences of others who have taught online, especially at other institutions. "We're at a stage where people want communities of practice, but you don't see enough of that happening in reality yet," Mr. Hill says.

Overall, as higher education tries to figure out how to incorporate online learning, Mr. Hill predicts some confusion as institutions seek to determine how well online education is working for them. Some elements will work, while others might be more problematic or even unfeasible. These disparate results can be at the same institution.

Some survey responders have experienced this. One administrator cautioned: "We went in too big and have experienced some issues. I'd like to see a very careful approach to development of these courses and rigorous assessment of them to determine their efficacy."

Mr. Hill recommends institutions look at their data and results and not be afraid to make big changes if their projections and original expectations about costs or enrollment do not match reality. It does not mean they need to abandon online learning altogether.

"It's really going to put the test to administrators in their ability to learn and to adjust and to have some humility in terms of what their original vision was," he says.

Looking ahead, administrators at many colleges and universities expect institutional investment in online education to continue, as the field continues to expand, mature, and improve. The amount of investment will vary by institution, but few colleges and universities will be able to stand still.

Methodology

In March 2017, Maguire Associates invited higher-education administrators, including chief information officers, provosts and chief academic officers, deans, program directors and chairs, and directors of educational media to participate in a survey. All respondents were responsible for or involved in online learning development and decisions at their institution. A total of 1,286 completed the survey. The response rate was 11.5 percent. The data collection took place in March of 2017.

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