

2013

# DISTANCE EDUCATION SURVEY RESULTS

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## TRENDS IN eLEARNING: TRACKING THE IMPACT OF eLEARNING AT COMMUNITY COLLEGES

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# IN FOCUS: THE YEAR IN REVIEW 2013

## The Great Recession Continues, but Not for Everyone

In 2013, the national economy began to recover more earnestly. Some states even increased funding for higher education, although not by much.<sup>1</sup> Performance-based funding, greater accountability, student completion rates and gainful employment became the often-heard buzz words of 2013. Not to be out done, most distance education programs are pressured to find ways to close the student achievement gap many online programs still experience as compared to face-to-face courses, or risk seeing further budget and staff reductions. As the authors of the ITC survey have suggested for the past several years, the Great Recession has forced many states to undergo a paradigm shift in how they will make funding decisions for colleges and universities in the years to come.

### CONTINUED GROWTH FOR ONLINE, DESPITE OVERALL COLLEGE ENROLLMENT DECLINE

In 2013, ITC's national survey of distance education programs once again confirmed that student enrollment in online courses continues to grow at a higher rate than overall student enrollment at colleges and universities. Although, most online programs no longer see the double-digit growth they experienced only five years ago, a robust, steady increase in the popularity for online learning continues. Students have “voted with their feet” by enrolling in distance education courses when they are available. From fall 2012 to fall 2013, ITC's survey participants reported a 5.2 percent rate of growth in student enrollment in their online programs.


For the first time, in fall 2012 the Department of Education's Integrated Postsecondary Education Data System (IPEDS) reported on the number of students who take distance education courses at postsecondary institutions in the United States. IPEDS data offers the most comprehensive data in higher education because every college and university in the United States must complete its annual survey in order to offer their students federally-funded financial aid. IPEDS reported that in fall 2012, 1,898,980 community college students (26.5 percent) enrolled in at least one distance education course. Concurrently, 2,678,995 undergrads at four-year institutions (25.3 percent), and 5,444,701 total undergraduate and graduate students, enrolled in at least one distance education courses at all post-secondary education institutions (26.4 percent).<sup>2</sup> IPEDS will be able to accurately document the future growth, or decline, of distance education when it tracks these numbers in the years to come.

The continued growth in online learning, which ITC survey respondents have reported since 2004, coincides with an overall decline in student enrollment which many colleges and universities have experienced, especially in those programs that cater to working adults. Student enrollment at colleges and universities traditionally increases during an economic downturn, and declines as the economy improves and students return to work. ITC survey respondents reported that their colleges experienced a 3.27 percent decline in

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<sup>1</sup> “State Higher Ed Budgets Rebound,” by Ry Rivard. Jan. 20, 2014, *Inside Higher Ed*. <http://www.insidehighered.com/news/2014/01/20/state-higher-ed-funding-rebounds-not-yet-where-it-was-recession>

<sup>2</sup> See Table 311.15 for more information. *Digest of Education Statistics—2012*, Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics, U.S. Department of Education. December 2013. [http://nces.ed.gov/programs/digest/d13/tables/dt13\\_311.15.asp](http://nces.ed.gov/programs/digest/d13/tables/dt13_311.15.asp)



overall student enrollment from fall 2012 to fall 2013. The National Center for Education Statistics Integrated Postsecondary Education Data System (IPEDS), which receives data from 100 percent of United States colleges, reports community colleges experienced a one percent increase in student enrollment from fall 2011 to fall 2012. Community colleges experienced a two percent decline in student enrollment during the previous academic year, from fall 2010 to fall 2011.<sup>3</sup>

The ITC results confirm two major trends: online enrollment has continued to be the predominant source of enrollment growth in higher education during the past nine years, and the growth in online enrollment continues to slow. During the past four years, ITC survey respondents reported the following growth rates for student enrollment in distance education:

- 2009 to 2010 as compared to previous academic year: 9 percent increase
- 2010 to 2011 as compared to previous academic year: 8.2 percent increase
- 2011 to 2012 as compared to previous academic year: 6.5 percent increase
- 2012 to 2013 as compared to previous academic year: 5.2 percent increase

## THE RISE AND DECLINE OF MOOCS

Advocates for massive open online courses (MOOCs) still exist, but the bloom, and gross expectations, may be off this rose. Poor student retention rates and public failures, such as what San Jose State University experienced in remedial math last fall,<sup>4</sup> have called the appropriateness of the MOOC approach into question. Distance educators were aghast to hear MOOC executives state that only five to six percent of their students completed the MOOCs in which they enrolled.<sup>5</sup> Their college administrators would never have allowed them to continue teaching online with such low student retention rates. It is disappointing that the media continues to equate MOOCs with “traditional,” credit-based, programs that happen to be taught online. This confusion is especially frustrating at a time when 74 percent of academic leaders rate the learning outcomes in online education as the same or superior to those in face-to-face instruction.<sup>6</sup>

The media seemed to signal the death knell for the MOOC model when Sebastian Thrun, founder of Udacity, articulated his disappointment, “We were on the front pages of newspapers and magazines, and at the same time, I was realizing, we don’t educate people as others wished, or as I wished. We have a lousy product.” Udacity had attracted 1.6 million students, but Thrun remarked that this “education revolution,” was “a disturbingly uneven one.”<sup>7</sup>

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<sup>3</sup> See Table 2 for more information. “Digest of Education Statistics–2012,” Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics, U.S. Department of Education. December 2013. <http://nces.ed.gov/programs/digest/d12/>

<sup>4</sup> “After Setbacks, Online Courses Are Rethought,” by Tamar Lewin. Dec. 10, 2013. New York Times. <http://www.nytimes.com/2013/12/11/us/after-setbacks-online-courses-are-rethought.html>

<sup>5</sup> “Retention and Intention in Massive Open Online Courses: In Depth,” by Daphne Koller, Andrew Ng, Chuong Do, and Zhenghao Chen. June 3, 2013. Educause Review. <http://www.educause.edu/ero/article/retention-and-intention-massive-open-online-courses-depth-0> and “Measuring the MOOC Dropout Rate,” by Ry Rivard. March 8, 2013. Inside Higher Ed. <http://www.insidehighered.com/news/2013/03/08/researchers-explore-who-taking-moocs-and-why-so-many-drop-out>

<sup>6</sup> “Grade Change: Tracking Online Education in the United States,” by I. Elaine Allen and Jeff Seaman. January 2014. Babson Survey Research Group and Quahog Research Group. <http://www.onlinelearningsurvey.com/reports/gradechange.pdf>

<sup>7</sup> “Udacity’s Sebastian Thrun, Godfather of Free Online Education, Changes Course 2013,” by Max Chafkin. Nov. 14, 2014. Fast Company. <http://www.fastcompany.com/3021473/udacity-sebastian-thrun-uphill-climb>



Not to be outdone by their academic counterparts, many universities have offered MOOCs to foster their image for being a cutting-edge institution. Others see MOOCs as a marketing tool and hope to encourage students to enroll in their credit-bearing courses, although there is no guarantee their MOOC students will enroll at their college. Finding a financially-sustainable model for creating, administering, and teaching MOOCs without receiving tuition from students has been a difficult, if not impossible, hurdle to overcome. Requiring students to pay tuition to take a MOOC defeats the philosophical premise for these new courses.

Colleges have found several useful and promising niches for MOOCs. Foundations like the Bill and Melinda Gates Foundation<sup>8</sup> and Hewlett Packard<sup>9</sup> have helped colleges create MOOCs to offer students a free or inexpensive way to master the remedial coursework they need to enroll in college. Higher education institutions like the College of Southern New Hampshire are experimenting with offering college credit to students who have taken MOOCs after they have passed the appropriate prior learning assessment exams.<sup>10</sup>

Experimentation continues, but the level of enthusiasm, and confidence that MOOCs are a bold new direction for education, has certainly ebbed. In 2013, the ITC survey respondents confirmed this trend. Only three percent stated they have developed a MOOC. Seventy-four percent indicated they have no plans to try.

## OPEN EDUCATIONAL RESOURCES (OERs)

For the second year, ITC asked community college administrators about their use of open educational resources (OERs) and documented a meaningful uptick in interest. Fifty percent of respondents indicated they thought the impact of OERs in higher education would be “significant” during the next three to five years.

A prime motivation for the interest and support for OERs in higher education has been tied to the soaring cost of textbooks. OERs offer a free alternative and a measurable reduction in costs for students. However, OERs need to receive a groundswell of support from faculty and administrators to build the momentum. Many see a paradigm shift in thinking as the OER and Creative Commons<sup>11</sup> movements often look to creating a more altruistic culture for sharing educational materials and resources.

## FEDERAL INTEREST IN DISTANCE EDUCATION HEATING UP

In 2013, members of Congress began offering hearings to identify changes to the Higher Education Act for its upcoming reauthorization. Congress is scheduled to reauthorize the Act in 2014, following its normal six year schedule since the law was last reauthorized in 2008, but many lobbyists think Congress will only become fully engaged in the reauthorization after the presidential elections in fall 2016. Regardless of the schedule, several issues have emerged that pertain to distance education.

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<sup>8</sup> See more information about the MOOC research initiative project at <http://www.moocresearch.com/research-initiative/>

<sup>9</sup> For more information see [http://h30458.www3.hp.com/us/us/smb/Sharpen-skills-and-advance-your-career-with-MOOCs\\_1366169.html](http://h30458.www3.hp.com/us/us/smb/Sharpen-skills-and-advance-your-career-with-MOOCs_1366169.html)

<sup>10</sup> “A Disruption Grows Up?” by Paul Fain. Oct. 1, 2012. Inside Higher Ed. <http://www.insidehighered.com/news/2012/10/01/competency-based-education-may-get-boost>

<sup>11</sup> For more information about the Creative Commons see <http://creativecommons.org>



## DEPARTMENT OF EDUCATION THREATENS ONLINE LEARNING TO RESPOND TO FINANCIAL AID FRAUD RINGS

On Feb. 14, 2014, the Office of the Inspector General for the U.S. Department of Education (OIG) released the report, “Title IV of the Higher Education Act Programs: Additional Safeguards are Needed to Help Mitigate the Risks that are Unique to the Distance Education Environment.” In this final report, the OIG requires the Department of Education to develop and implement a “corrective action plan” (CAP) within 30 days (by March 14, 2014) that addresses student financial aid fraud, with a particular focus on distance education. The CAP must “set forth specific action items, and targeted completion dates, necessary to implement final corrective actions on the findings and recommendations contained in this final audit report.

This “corrective action plan” (CAP) could impose costly and unfair regulations on distance education programs at colleges and universities, which the OIG states “is the fastest growing segment of higher education and creates unique oversight challenges and increases the risk of school noncompliance with the law and regulations. Distance education also creates new opportunities for fraud, abuse, and waste in the Title IV programs.”

The report recommends the Department of Education:

1. “Develop regulations that require schools to verify the identity of all distance education students at the time of enrollment.” Colleges currently only need to authenticate students by ensuring they use a secure login and passcode. The OIG proposes requiring colleges obtain from students, “proof of name, high school diploma, educational transcripts, or college admission test scores” to “help corroborate identity and ensure the student intends to obtain an education.”

The OIG also proposes having colleges contract with “independent public accountants, not accrediting agencies, to assess the effectiveness of schools’ processes for verifying a student’s identity.” This would be part of the “annual compliance audit.”

2. “Amend the regulations to require more frequent disbursements of Title IV funds. The disbursements should coincide with the timing of institutional charges and other expenses, such as child or dependent care expenses and monthly Internet fees.”
3. “Amend the regulations expressly to apply the definition of attendance in 34 C.F.R. § 668.22(l)(7) to the regulations for returning Title IV funds for students who do not begin attendance.”
4. “Issue guidance that clearly explains what is considered acceptable evidence of a distance education student’s academic attendance.”
5. “Work with Congress to revise the HEA so that schools are required to develop cost of attendance budgets applicable to the student’s actual educational needs and not include costs that are unnecessary to complete the student’s program of study.”

This last recommendation probably refers to a restriction members of Congress considered and dismissed in 2013, which would disallow distance learning student from using student financial aid funds to pay for living expenses. Online students need financial support so they can complete their college education just as much as traditional face-to-face students. They also have mortgages and take lower-paying, part-time jobs so they can attend college and attain their educational goals.

On Oct. 20, 2011, the Department of Education sent higher education institutions a “dear colleague” letter which stated that “detecting fraud before funds have been disbursed is the best way to combat this crime. We therefore seek the help of institutions and advise that you take the following additional actions to identify and prevent the kind of student aid fraud identified in the IG’s report.”

Examples of measures institutions have instituted to combat these fraudulent “students” have included:<sup>12</sup>


- Create an interdepartmental “fraud squad” to monitor potential illegal activity,
- Provide enhanced training to student financial aid staff—give them the confidence to deny financial aid to suspicious students,
- Create a policy to deny aid to suspicious individual(s),
- Wait two weeks before dispersing financial aid,
- Give students partial financial aid payments throughout the term rather than one lump sum payment,
- Record unsatisfactory academic performance,
- Look twice at individuals who have multiple addresses, similar IP or home addresses, or unusual student enrollment clusters,
- Create a system so faculty can report similar student assignments to alert staff about trends,
- Require students to take an orientation when they enroll,
- Require students provide a copy of their high-school transcript when they enroll.

It is unclear whether the Department of Education will adopt any or all of the OIG recommendations, or whether it has the legal authority to impose the proposed detrimental regulations on distance educators without eliciting public comment or without Congressional authorization. The OIG report is vague in many areas—the ITC survey authors hope the details will be reasonable and manageable, but they are concerned that officials from the Department of Education and members of Congress could support some of the more onerous OIG recommendations which could inhibit distance learning programs on college campuses.

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<sup>12</sup> Visit <http://ifap.ed.gov/dpcletters/GEN1117.html> for more tips institutions can take to deter these crimes.





ITC continues to strongly recommend colleges implement policies and procedures that prevent, catch and help local, state and federal government agencies prosecute the perpetrators of financial aid fraud. However, distance educators and students should not have to accept unfair regulations that will not solve the problems outlined in the OIG report. This is a message ITC members need to convey to Congress as their representatives and senators take steps to reauthorize the Higher Education Act.

## STUDENT AUTHENTICATION UPDATE

When it reauthorized the Higher Education Act in 2008<sup>13</sup>, Congress required institutions that offer distance education and correspondence education to “have processes in place through which the institution establishes that the student who registers in a distance education or correspondence education course or program is the same student who participates in and completes the course or program and receives the academic credit.”

In its rulemaking proceeding, the Department of Education clarified that accrediting bodies need to require “institutions to verify the identity of a student who participates in class or coursework by using, at the option of the institution, methods such as—a secure login and pass code, proctored examinations, and new or other technologies and practices that are effective—in verifying student identification.” This allows institutions to continue using the process they typically use to authenticate their online students within their course management system—a login and password—rather than impose a more rigorous or costly method.<sup>14</sup>

As noted above, the Department of Education and Congress will likely revisit the idea of making colleges implement more stringent procedures to authenticate students when the Higher Education Act is reauthorized in 2014 or thereafter.

## STATE AUTHORIZATION FOR INSTITUTIONS OFFERING DISTANCE EDUCATION TO OUT-OF-STATE STUDENTS


In 2011 and 2012, the U.S. Court of Appeals and the U.S. District Court stated that the Department of Education lacked the legal authority to withhold federal student financial aid dollars from colleges that do not comply with state laws regarding state authorization for distance education because the Department did not follow the proper notice of proposed rule-making (NPRM) procedures. Nevertheless, institutions must still abide by state laws to avoid state penalties for non-compliance and to comply with national accreditation guidelines that require colleges to be in good standing with state laws and regulations. The U.S. Department’s effort to obtain the authority to penalize colleges in 2010 increased awareness among state regulators—they realized they could hold out-of-state institutions that teach their in-state residents accountable, impose fees and force them to comply with state regulations.

Should colleges seek authorization from each state in which they have correspondence or online students? Should they wait to receive notice from the appropriate state agencies before taking these steps? Should they obtain authorization from every state in case future distance learning students enroll in their courses? The process can be expensive and time consuming, especially for colleges that have a lot of out-of-state distance learning students. The rules and regulations in each state vary.

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<sup>13</sup> Congress called the 2008 reauthorization the “Higher Education Opportunities Act.”

<sup>14</sup> Visit [www2.ed.gov/policy/highered/leg/hea08/index.html](http://www2.ed.gov/policy/highered/leg/hea08/index.html) for more information.



A national effort is underway to encourage every state legislature to approve a State Authorization Reciprocity Agreement (SARA), whereby states will agree to recognize the distance education efforts from institutions located in other SARA-member states, without imposing additional fees or quality controls, as long as they are in good standing with their regional accreditation agencies.<sup>15</sup>

The four regional compacts—the Western Interstate Commission for Higher Education, WICHE, Midwestern Higher Education Compact, MHEC, the New England Board of Higher Education, NEBHE, and the Southern Regional Education Board, SREB—will ensure state regulators in their region have the proper processes in place to monitor compliance. Since the regional compacts will play this deciding role, SARA will give some regional compacts a new regulatory authority, which could be problematic for some state legislators.

The SARA organizers hope to recruit 25 states as members by July 2015. In addition to having their state on board, institutions must pay an annual fee of \$2,000 to \$6,000 to be a part of SARA.

ITC recommends colleges continue to obtain authorization from each state in which they teach students online until a critical mass of states agree to SARA's guidelines. Here is a process which members of the ITC board of directors recommend colleges follow:

1. Create a process to identify out-of-state students enrolled at the institution. One might limit the search to students who:
  - a. have a permanent out-of-state address,
  - b. pay out-of-state tuition,
  - c. are only enrolled in fully-online courses, and
  - d. have been allocated financial aid.
2. Create an application process to obtain state authorization from those states in which students reside.
3. Contact the states in which those out-of-state students reside to obtain state authorization.

To help institutions comply with state regulations, the State Higher Education Executive Officers (SHEEO) has created several invaluable directories, which they update regularly.<sup>16</sup> These directories include state-by-state agency and contact information. They also include data on the types of educational providers states authorize, exemptions, physical presence policy triggers, application processes, associated fees, interstate reciprocity agreements, contact information for consumer/student protection and student complaints, legislative or regulatory changes, and enforcement measures.

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<sup>15</sup> The National Council for State Authorization Reciprocity Agreements (NC-SARA) is leading this effort. Visit <http://nc-sara.org/> for more information.

<sup>16</sup> Visit Web site [www.sheeo.org/stateauth/stateauth-home.htm](http://www.sheeo.org/stateauth/stateauth-home.htm) or the directory at <http://www.sheeo.org/node/434> for more information.

## PREDICTING THE FUTURE OF EDETECH

by Brian Whitmer, Co-founder and Chief Learning Officer, Instructure

I have been studying the edtech market for the past six years, pushing for mindshifts and technology refreshes wherever possible. Before that, I researched software usability in my graduate and undergraduate programs. Based on this experience, I can tell you how technology is holding back educational breakthroughs and where opportunities exist to improve online learning experiences. I have no idea what online learning will look like in 10 years, a virtual lifetime in technology. I would need a time machine to tell you about the crazy, unexpected innovations we will probably see by 2024. I can tell you which areas are ripe for innovation: usability, interoperability and mobile learning.



### Usability

Software used to be about management and administration, but it has become a standard part of nearly everyone's daily workflow. Consequently, demand has increased across industries for more end-user-centric technology. To better appeal to their users, many software vendors are trying to catch up to modern Web standards.

The same is true in education—and teachers and students increasingly rely on the online environment to supplement and initiate learning. Students and teachers were frustrated with trying to use software that fell short of their needs. Many computer developers have focused more on end-user experiences, which makes all the difference. Fortunately, new technology upstarts tend to emphasize ease-of-use over the frenzy to include more features.

The trend toward usability has introduced all sorts of new opportunities for technology to foster and improve learning. For example, Bellevue College used technology to build a community for autistic students to support their unique needs. By adding a simple, usable, online component to the students' learning experience, they were able to provide better engagement and collaboration on campus and at home, to help this high-risk group from feeling disconnected and discourage them from dropping out of college. Better usability opens up all sorts of doors for innovative ideas.

### Interoperability

As the cloud makes it easier and faster for companies to develop new systems, organizations will switch to new applications more frequently, and, in the process, demand greater assurances for data portability. As they switch out and mix and match pieces of their infrastructure, they will want everything to work together seamlessly. Interoperability standards like Learning Tools Interoperability (LTI) will play an increasingly important role as the software industry continues to evolve.<sup>17</sup>

While the move toward interoperability is not as far along as usability, organizations are getting wise to the fact that one vendor cannot provide every piece of a growing online solution. No one can be the best at everything, and it makes sense to identify smaller players that can better innovate within their own niche, as long as the smaller players are able and willing to work together.

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<sup>17</sup> Visit <http://www.imsglobal.org/toolsinteroperability2.cfm> for more information.

## Mobile

Today, most mobile applications are merely portable versions of their Web counterparts. This mindset—that mobile is just a quick-reference subset of the desktop—will change. As innovative companies and organizations are beginning to ask, “what would we do differently if every student on campus had a smartphone?” we will see the rise of some really exciting mobile-first features.

Synchronous or semi-synchronous communication and geolocation are two areas for mobile applications educational providers have dabbled in, but have not fully embraced. For example, educators could greatly enhance a student’s overall learning experience if they had a pocket study tool that provides ready access to materials and more frequent, possibly push-based, review of topics.

Although we cannot predict the future of technology, I am confident that the bar for quality software will continue to rise across industries, and that users will continue to expect more usable, approachable, and globally-accessible technology solutions. I am grateful to have played a role in the ed tech evolution that has brought us this far, but I also know that we are continually laying the groundwork for the new and unexpected innovations of the future.





## ITC SURVEY HISTORY

Members of the Instructional Technology Council (ITC) board of directors created ITC's annual distance education survey in fall 2004 to respond to the growing need for national data related to distance learning program creation and development and to track key issues for faculty and students. In the past, distance education practitioners have used data from the U.S. Department of Education and the annual series of reports by Sloan-C, but the landscape lacked a reliable source of longitudinal data gathered on a regular basis. The ITC survey fills that gap, particularly given the relative newness of online instruction. Core survey questions have remained consistent; however, ITC added questions on the use of assisted, hybrid and live interactive video courses in 2008, questions pertaining to student authentication in 2009, questions about state authorization in 2011, and questions about the use of open educational resources in 2012.

ITC has conducted this distance education survey in late-October and November since fall 2004. During even-numbered years between 2006 and 2012, ITC distributed the survey to members of the American Association of Community Colleges (AACC). However, the authors ended this practice in 2012 due to uneven response rates from AACC members, and currently only surveys members of the ITC.

## SURVEY METHOD

Distance education practitioners developed and reviewed the survey questions to ensure the data and information generated is of value to distance learning administrators and faculty. The authors divided the questions into four categories: general information, administrative, faculty, and students.

ITC e-mailed the survey to member representatives at its 375 member institutions. ITC received 142 completed responses (39 percent of ITC members). The completed surveys were reviewed to ensure a representative sample of institutions had participated. The review confirmed an acceptable response rate, and an acceptable distribution of completed surveys, from a range of institution sizes and locations. For all percentages included in this report, "no answer" responses are not listed—consequently, data will not always equal 100 percent.

Typically, the distance education administrator completed the survey on behalf of his or her institution. A longitudinal review established a strong continuity amongst completers—70 percent of the annual submissions have come from the same campuses during the nine years of the survey.

## DISTRIBUTION OF RESULTS

The ITC will mail a printed version of the survey to ITC members and to the community college presidents of all AACC-member institutions. ITC will also post an electronic version of the results on its Web site at [www.itcnetwork.org](http://www.itcnetwork.org).

# 2013 SURVEY RESULTS

## GENERAL INFORMATION

**Institutions Surveyed.** More than 91 percent of respondents identified themselves as associate's colleges (86.36 percent) or associate's dominant colleges (4.55 percent).<sup>18</sup>

**Distance Education Enrollment Growth.** ITC asked respondents to report comparative enrollment trends in distance education from fall 2012 to fall 2013, the most recent full year of available data. Campuses reported a 5.2 percent increase in distance education enrollments—a number that is slightly lower than the 6.5 percent increase reported from fall 2011 to fall 2012.

ITC asked respondents to identify factors that contributed to the increase in distance education enrollments. As table 1 below confirms, impacts related to the economic downturn are subsiding:

**TABLE 1. Reasons Cited for Increased eLearning Enrollments**

Reason	2010	2011	2012	2013
Economic downturn	37 percent	22 percent	18 percent	40 percent**
Typical distance education growth	39 percent	28 percent	28 percent	36 percent**
New enrollment initiative	12 percent	14 percent	9 percent	17 percent**
Don't know	5 percent	7 percent	11 percent	18 percent**
Other	7 percent	13 percent	21 percent	17 percent**

**Direct Report Line.** In 2013, more than 72 percent of respondents indicated they report to the vice president of academic affairs or an academic dean. This figure remained statistically unchanged from 2012 and confirms a trend toward reporting to the academic, rather than the technology, side of the institution. In 2013, only one respondent indicated he or she reports directly to the institution's president. Two percent reported to a vice president for technology—statistically unchanged from last year. Seven percent reported to a non-academic dean (which is higher than in 2012, matching the 2011 percentage) and eight percent reported to an IT administrator (an four percent increase compared to 2012).



- Getting online student services to equal those offered in a face-to-face environment.
- Creating a stable infrastructure and obtaining funding to support LMS growth and expansion.
- Finding faculty to replace retiring faculty who teach online.
- Expanding online enrollment to meet student demand without sacrificing quality.

—2013 ITC Survey Respondents

<sup>18</sup> For information on institutional classifications, visit [http://classifications.carnegiefoundation.org/descriptions/ugrad\\_program.php](http://classifications.carnegiefoundation.org/descriptions/ugrad_program.php).

\*\* Note: In the 2013 survey, respondents checked more than one response to this question, whereas in previous years respondents only chose one response.

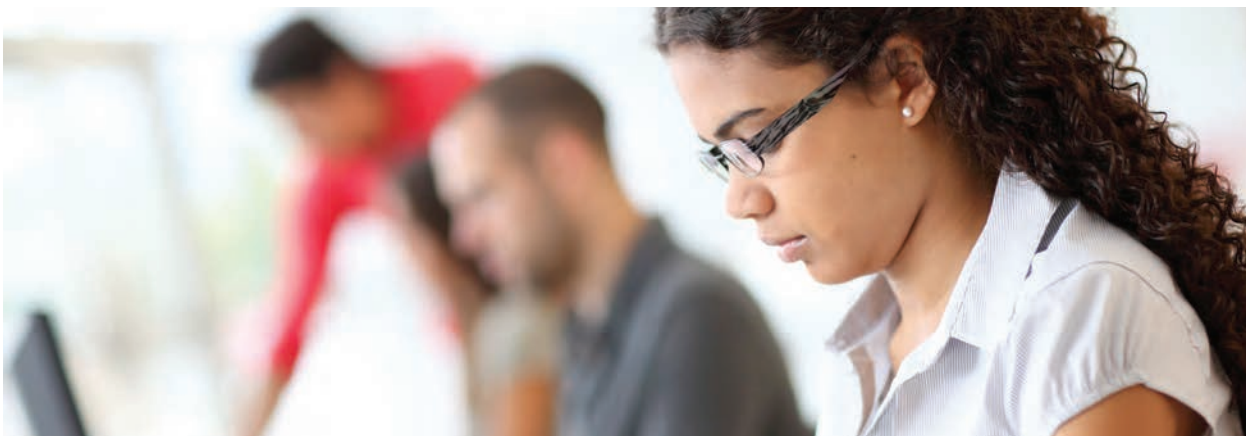


## ADMINISTRATIVE QUESTIONS

**Challenges.** Each year, ITC has asked distance education administrators to rank the challenges they face with regard to administering online courses. From 2004 to 2010, their number-one challenge was a lack of proper support staff to help them train faculty and provide technical assistance to faculty and students. In 2011 to 2013, distance education administrators were most concerned about providing adequate student services for distance education students.

Other trends of interest included:

- ITC's survey respondents have ranked the need to adequately assess distance education courses and programs as one of their top four challenges, since the survey began listing this requirement in 2009. In 2013, the respondents let this challenge slip to number four, perhaps suggesting administrators have devised solutions to address this need for assessment.
- At most campuses, distance education administrators play no role in the processes colleges have for selecting faculty, courses and their content, schedule offerings, or evaluation. Not surprisingly, the survey respondents have ranked having inadequate administrative authority as the number three challenge they faced in 2013.
- Since the 2008 reauthorization of the Higher Education Act, the respondents have ranked the increased federal engagement in distance education as a new challenge. Consequently, they now have to grapple with the need to certify and document compliance with state authorization laws, student authentication, and student financial aid issues.
- Respondents have indicated that their concerns about obtaining adequate staffing and administrative space have declined during the past nine years. However, obtaining adequate budgetary support to run the distance education program remains given the state of the economic recovery. Receiving adequate support staff to provide training and technical assistance re-emerged as a significant concern in 2013.
- Distance education administrators continue to consistently rank challenges involving student and organizational acceptance as their lowest concerns. Interestingly, the challenge of faculty acceptance ranked seventh this year suggesting campuses are having some issues as they implement Federal compliance, assessment and quality course improvements.



**TABLE 2. Greatest Challenges for Distance Education Programs Administrators**

Range for responses—1 is the greatest challenge, 8 is the least challenging

Challenge	Rank 2004	Rank 2005	Rank 2006	Rank 2007	Rank 2008	Rank 2009	Rank 2010	Rank 2011	Rank 2012	Rank 2013
Adequate student services for distance education students	2	5	3	2	2	2	3	1	1	1
Adequate assessment of distance education classes <sup>19</sup>						3	2	2	2	4
Support staff needed for training and technical assistance	1	1	1	1	1	1	1	7	3	2
Operating and equipment budgets	3	2	2	3	3	4	4	4	4	5
Adequate administrative authority	5	4	4	5	4	5	5	8	5	3
State authorization regulations <sup>20</sup>								11	6	6
Student authentication <sup>21</sup>								10	7	9
Compliance with new financial aid attendance requirements <sup>22</sup>								3	8	8
Adequate space for training and technical assistance	7	7	6	6	6	7	6	9	9	10
Faculty acceptance	4	3	5	4	5	6	7	5	10	7
Organizational acceptance	6	6	7	7	7	8	8	6	11	11
Student acceptance	8	8	8	8	8	10	10	12	12	12

**Learning Management System Usage.** During the past nine years, Blackboard acquisitions have overshadowed the learning management system (LMS) market. In 2013, the market share for Blackboard Learn, including Blackboard Learn-Angel Edition, was 58 percent. This included the end-of-life for WebCT migrations to Blackboard. The numbers indicate that Blackboard has stemmed the steady decline of market share during the past years, down from 78 percent with its new acquisition of WebCT in 2007. Desire2Learn has not been able to gain a significant share of the market to date with 11 percent. However, Moodle has a new high of 17 percent, and Instructure Canvas has seen continued growth with a market share of 12.5 percent.

<sup>19</sup> “Adequate assessment of distance education classes” was introduced as a new option in 2009.

<sup>20</sup> “State authorization regulations” was introduced as a new option in 2011.

<sup>21</sup> “Student authentication” was introduced as a new option in 2011.

<sup>22</sup> “Compliance with new financial aid attendance requirements” was introduced as a new option in 2011.

**TABLE 3. Learning Management System Usage**

	2007	2008	2009	2010	2011	2012	2013
Blackboard Learn	39 percent	38 percent	26 percent	26 percent	30 percent	35 percent	58 percent
Blackboard WebCT <sup>23</sup>	39 percent	20 percent	10 percent	10 percent	7 percent	2 percent	—
Blackboard Angel Learning <sup>24</sup>	—	—	—	10 percent	15 percent	15 percent	—
Angel Learning <sup>25</sup>	9 percent	11 percent	13 percent	—	—	—	—
Desire2Learn	4 percent	5 percent	7 percent	8 percent	13 percent	15 percent	11
Moodle	10 percent	11 percent	6 percent	9 percent	11 percent	14 percent	17
Instructure Canvas <sup>26</sup>	—	—	—	—	—	9 percent	12.5

In 2012 and 2013, only 27 percent of ITC survey respondents indicated they were considering switching their LMS “in the next few years.” From 2004 to 2012, one third of the ITC survey respondents indicated they wanted to change. Similarly, in 2013 more than 73 percent of respondents indicated they do not plan to switch their LMS. This response rate was 56 percent two years ago. The authors suspect the high costs associated with a LMS migration, and “migration-fatigue,” due to the turbulent LMS market in recent years, contributed to this response.

Seventy-seven percent of respondents restrict the number of LMS platforms the campus will support which continues to rise from percentages reported just a few years ago (67 percent in 2011). Table 3 provides the response pattern over the past seven years. The LMS market continues to reflect a degree of consolidation and maturing with a reduction in open-source options and an ever-changing number of smaller LMS disappearing from the list.



- My institution is still acquiring land and talking about bricks and mortar as a way to expand the reach of the college.
- The college administration does not seem to understand the importance of eLearning as a way to grow the college. In recent budget cuts, administrators singled out the eLearning department for decreases despite the fact that flexible course delivery generates additional full time enrollment numbers (FTE) for the college.
- Getting faculty to attend training sessions.

—2013 ITC Survey Respondents

<sup>23</sup> Blackboard acquired WebCT in 2005.

<sup>24</sup> Blackboard purchased Angel Learning in fall 2009.

<sup>25</sup> Blackboard purchased Angel Learning in fall 2009.

<sup>26</sup> Instructure launched Canvas in 2011.

**Accessibility Compliance.** The ITC survey respondents have expressed a steady decline in their confidence as to whether their online courses adequately comply with Section 504<sup>27</sup> and Section 508<sup>28</sup> of the Rehabilitation Act of 1973, since ITC began asking survey participants about the accessibility of their online classes in 2008. On June 29, 2010, the Department of Justice and Department of Education sent college presidents a joint “dear colleague letter” that questioned whether electronic book readers are accessible to students who are blind or have low vision. This letter greatly increased awareness among the overall college administration and among distance educators about the need to comply with these national accessibility guidelines, rules and regulations.<sup>29</sup>

In 2013, three percent of survey respondents indicated none of their classes were compliant. Many ITC survey respondents cite their lack of compliance is due to their lack of adequate funding and staff resources and the absence of an institutional priority to address noncompliance issues.

**TABLE 4. Accessibility Compliance**

	Completely or mostly compliant	Some compliant
2008	73 percent	26 percent
2009	54 percent	21 percent
2010	43 percent	28 percent
2011	53 percent	39 percent
2012	52 percent	44 percent
2013	50 percent	47 percent

**Online Degrees.** For 2013, 87 percent of respondents report they are offering at least one distance education degree. This number dipped slightly from 90 percent in 2012, but increased from 78 percent in 2011, and only 66 percent in 2010. The ITC survey follows the U.S. Department of Education’s definition which states that at least 70 percent of the coursework students need to complete the degree program is available online. National efforts, such as the community college completion agenda<sup>30</sup> and continued maturation of online learning likely account for the upward trend. Respondents reported percentage increases across all categories of degree programs, including measurable increases for community colleges which are offering online bachelor’s degrees for the first time. Both are positive developments and indicate a continued strengthening of distance education programs. Chart 1 offers a percentage breakdown by degree type:

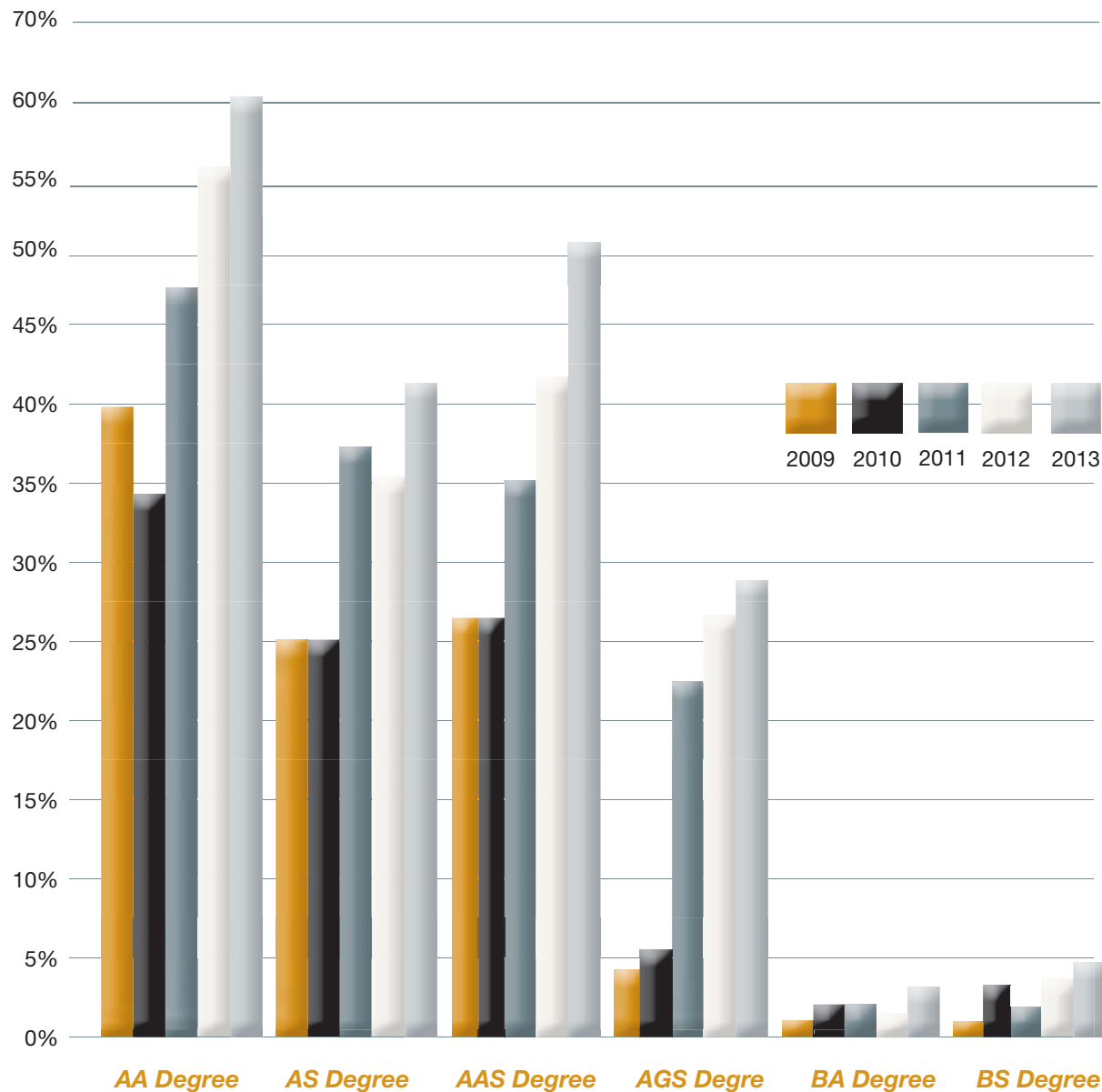
<sup>27</sup> Section 504 states that “no qualified individual with a disability in the United States shall be excluded from, denied the benefits of, or be subjected to discrimination under” any program or activity that either receives Federal financial assistance or is conducted by any Executive agency or the United States Postal Service.

<sup>28</sup> Section 508 requires federal electronic and information technology to be accessible to people with disabilities, including employees and members of the public.

<sup>29</sup> See the “dear colleague letter” the Department of Education and the Department of Justice sent college presidents at <http://www2.ed.gov/about/offices/list/ocr/letters/colleague-20100629.html>

<sup>30</sup> For more information about the completion agenda see [https://www.aacc.nche.edu/ABOUT/COMPLETION\\_CHALLENGE/](https://www.aacc.nche.edu/ABOUT/COMPLETION_CHALLENGE/).


**CHART 1. Types of Online Degrees Programs at Community Colleges**



**Online Certificates.** In 2013, 81 percent of respondents indicated their institution offers an online certificate option (The ITC survey follows the U.S. Department of Education's guidelines which states at least 70 percent of the coursework students need to complete the certificate is available online.). This is unchanged from 2012 and re-affirms the value placed on certificate programs at community colleges.

**Class Hosting.** The 2013 survey continues to confirm a trend toward out-sourced, often cloud-based, server support. Possible reasons for this trend include: administrative support for the advantages cloud-based and consortium-based hosting provide, the high cost to purchase the necessary technology equipment and provide staff support for in-house IT solutions, and the increasing number of LMS providers that require colleges to use their corporate servers. This trend under-scores a growing philosophical discussion many campuses have had regarding IT operations. Budget cuts and staff reductions have made out-sourcing solutions not only more attractive, but often essential for most IT operations, especially for colleges that have limited server capacity.

The survey found that:

- Thirty percent of respondents reported they own and maintained their own servers—down from 36 percent reported in 2012—and down from a high of 50 percent in 2008.
  - Fifty-five percent reported they outsource their server needs to a third party. This is up two percent from last year and up 19 percent from 2010 (36 percent).
  - More than 12 percent of respondents reported they shared servers with others, such as a state system, district or consortium. This is statistically unchanged from last year.
- 
- Developing a faculty evaluation tool that is suited to eLearning.
  - Creating a way to assess all courses for quality design—not just teaching about its importance and working with faculty to improve—but actually having the authority to assess quality.
  - The biggest challenge to our program will be changing our learning management system (LMS). The change process will include: creating a vetting process, testing the competitors, selecting the right LMS, pilot testing a few sections, training faculty to use the new system, supporting two LMSs during the transition, and supporting the final migration. The process will take enormous resources and we do not anticipate hiring any additional staff throughout the process.

—2013 ITC Survey Respondents

**Online Course Enrollment Caps.** In 2012, the authors of the ITC survey stopped asking whether community colleges limit their online course size. The responses were essentially the same each year—80 percent of respondents indicated their college caps student enrollment in online courses. The typical enrollment cap by class type also remained consistent: 25 students for an introductory English composition class, 27 students for an introductory math class and 30 students for an introductory political science class.

However, interest in the response to this question has resurfaced with the advent of massive open online courses (MOOCs) at four-year universities. Limited funding and the need to downsize administrative and faculty numbers have forced some campus administrators to consider increasing their online class size. However, community colleges do cap the enrollment of online classes for several reasons. Many faculty contracts limit their workload, many community college campuses impose the same smaller class size models they use online as for their face-to-face classes, and many campuses limit student enrollment because they recognize the unique challenges the virtual classrooms face. Lower class sizes boost online course quality by ensuring faculty-to-student interaction and engagement.

**Course Content Development.** In 2012, the authors of the ITC survey also stopped asking whether community colleges create their own online course content or if they use materials they purchased from a textbook publisher or other online course content provider. Past ITC surveys have consistently shown that 80 percent of community colleges develop their own course content and approximately 20 percent regularly use publisher-produced content.

Today, most colleges have at least one qualified instructional designer on their staff. Previously, many community colleges were plagued by an acute shortage of trained and experienced online instructional designers. Most lacked adequate professional development funding for existing staff members.

Distance education departments have seen progress on both counts. A growing number of colleges have adopted, or created their own, quality assessment rubrics and review processes, such as Quality Matters. These efforts have positively impacted the standardization of online course quality and have streamlined the course design and content development process at many colleges.



- Having a mandatory tutorial in place for students to take prior to enrolling in an online course would greatly enhance online retention rates for newer students. We are in the process of putting this in place.
- Contract issues that limit adequate assessment of online courses continues to be our biggest challenge. We have been unable to improve our program because of this. We also lack adequate administrative authority again because of the faculty contract. We have limited new course development until we have solved this issue.

—2013 ITC Survey Respondents

**Course Equivalency.** Accreditation standards require that the content and rigor of distance education courses are equivalent or better than that of the courses the college offers in a face-to-face environment. In 2013, 96 percent of survey respondents indicated their courses were equivalent (82 percent) or superior (14 percent) to traditional instruction on their campus. This is the highest ever percentage response for equivalency to this survey question. In 2011, nearly 80 percent of respondents indicated their online classes were equivalent or superior to traditional instruction at their campus. Time will tell whether these figures constitute an anomaly or indicate that distance educators have become more sophisticated appraisers of course quality.

**Services and Technology Support.** As the number of online students have grown, most campuses have recognized the need to introduce or expand their virtual services and online support. Regional accrediting agencies require that institutions offer distance learning students support services that are equivalent to their on-campus and face-to-face counterparts. Most distance educators have learned that colleges must offer these services to help their online students to succeed in the virtual environment.

In 2011, respondents reported a marked decrease in their online student support service offerings, despite the consistent increase shown in previous years. This could be due to budget cuts that reduced staff numbers and the ability of colleges to contract with outside vendors to provide these services. Perhaps the survey participants thought the services their colleges were offering their online students were substandard. Regardless of the reasons for the decline in 2011, the survey results in 2013 show that more colleges are offering these critical virtual services to their online students.

Note that the ITC survey did not ask these questions in last year's 2012 survey, but the authors brought them back in 2013 due to popular demand.

**TABLE 5. Status Report—Student Services and Technology Support**

Service or Technology	Currently Offer				Plan to offer in next year				Plan to offer in two or more years			Do not plan to offer		
	2005	2010	2011	2013	2005	2010	2011	2013	2010	2011	2013	2010	2011	2013
Campus Web portal <sup>31</sup>	–	73	62	80	–	14	8	8	6	12	3	7	8	7
Dedicated Web site for distance education	80	88	65	77	6	4	8	5	1	4	5	7	12	13
Online admission to institution	77	94	82	85	14	4	4	13	1	2	2	1	2	0
Online registration for classes	86	94	86	95	9	2	1	5	2	2	0	1	1	0
Online payment tuition & fees payment	77	93	85	96	15	5	0	2	1	5	1	1	1	1
Online student orientation for online courses	75	79	63	73	17	16	19	22	2	5	3	2	2	1
Online library services and resources	98	94	88	98	1	4	1	0	1	2	0	1	0	2
Online counseling and advising services	49	60	49	47	27	17	16	22	14	12	16	9	12	13
Online tutoring assistance	44	71	75	76	15	17	11	13	9	2	5	4	4	3
Online information and application for financial aid	80	86	82	80	15	6	4	15	5	4	3	2	1	3
HelpDesk & technical support for online education faculty	91	94	86	98	5	2	2	1	2	0	1	1	2	0
HelpDesk & technical support for online students	86	93	85	98	11	2	2	0	2	0	2	2	3	0

<sup>31</sup> “Campus Web portal” was introduced as a new option in 2010.

Service or Technology	Currently Offer				Plan to offer in next year				Plan to offer in two or more years			Do not plan to offer		
	2005	2010	2011	2013	2005	2010	2011	2013	2010	2011	2013	2010	2011	2013
24/7 HelpDesk & technical support for online faculty and students <sup>32</sup>	–	–	35	27	–	–	6	9	–	9	5	–	38	50
Online textbook sales	70	75	79	88	7	8	5	2	5	2	5	13	3	1
Online student organizations, Web site & services	42	54	49	65	20	21	9	8	13	12	16	13	18	0
On-campus testing center	69	81	68	84	3	5	1	1	1	11	5	12	9	9
Online plagiarism evaluation	40	53	56	69	25	23	8	8	11	10	10	13	13	10
Online student course evaluation	83	85	79	91	11	8	7	2	4	2	1	4	2	6
Faculty training for online teaching	92	95	85	97	4	4	4	2	0	1	1	1	0	0
Audio Podcasting <sup>33</sup>	–	69	65	77	–	20	9	9	4	3	6	8	10	6
Digital video repository <sup>34</sup>	–	–	44	58	–	–	9	15	–	10	13	–	24	10
Web conferencing or Webinar solution <sup>35</sup>	–	–	–	80	–	–	–	8	–	–	8	–	–	3
Live lecture-capture <sup>36</sup>	–	–	–	51	–	–	–	15	–	–	11	–	–	18
MOOCs (massive open online classes) <sup>37</sup>	–	–	–	3	–	–	–	2	–	–	17	–	–	73

<sup>32</sup> “24/7 HelpDesk & technical support for online faculty and students” was introduced as a new option in 2011.

<sup>33</sup> “Audio podcasting” was introduced as a new option in 2010.

<sup>34</sup> “Digital video repository” was introduced as a new option in 2011.

<sup>35</sup> “Web conferencing or Webinar solution” was introduced as a new option in 2013.

<sup>36</sup> “Live lecture-capture” was introduced as a new option in 2013.

<sup>37</sup> “MOOCs (massive open online classes)” was introduced as a new option in 2013.

**Distance Education Fees.** Fifty-four percent of respondents indicated that they charge students an additional per-credit fee to take a distance education course. For those campuses that do charge students a distance education or technology fee, respondents charged \$4 to \$75 per credit, with a median average of \$23.

Although some distance learning programs have self-supporting or assisted models, most receive mainstream budget funding from their college administration. Their decision for assessing a separate student fee to take a distance education course is tied closely to the institution's culture and the number of fees the college already charges its students. Most community colleges do not like to impose additional fees on students. However, as distance education enrollments continue to climb, program administrators need to pay additional licensing fees for technology-related services, such as learning management systems, additional support services, and hiring staff members who have special knowledge about distance education and technology skill sets. Increasing student fees could be the only available option distance education departments have to pay for these costs.



- All of the improvements we want to make must go before the appropriate committees prior to their approval or implementation. This process is too slow for us to make the changes we need to improve our program.
- Student retention and student success are becoming increasingly important. Complying with the American's with Disabilities Act and addressing and accessibility needs for students. We need to conduct an audit of our online courses, provide faculty with the necessary equipment and technologies, and offer the necessary training to our faculty and staff so we can comply with these rules and regulations and do what is right for our students.

—2013 ITC Survey Respondents





## COURSE FORMATS IN TECHNOLOGY-MEDIATED INSTRUCTION

In 2008, ITC introduced several questions to the survey that pertained to blended or hybrid and Web-facilitated courses. The survey defined a blended or hybrid course as one in which 30 to 79 percent of the content is delivered online, with online discussions and some face-to-face meetings. A Web-facilitated course (also known as Web-enhanced or Web-assisted) is a face-to-face program that incorporates the Internet to facilitate activities; one to 29 percent of the content is delivered online. Instructors often post the syllabus and assignments within a learning management system or on a Web page. During the past five years, the ITC survey has shown that a significant number of colleges have increased the number of courses they offer in these formats.

### TYPE OF COURSE FORMATS OFFERED

Respondents identified the formats their technology-delivered credit courses use. The types of courses they offer has remained unchanged since 2008, except for the percentage of completely-online courses, which declined more than 20 percent since 2008. Survey respondents could identify more than one format. Their responses are summarized below:

- In 2013, 58 percent of respondents offered completely-online courses, compared to 63 percent in 2012.
- Fourteen percent offered blended or hybrid courses, compared to 27 percent in 2012.
- Thirty-nine percent offered Web-assisted courses.
- One percent offered telecourses via cable, which is unchanged from 2012.
- None of the respondents offered other forms of telecourses, compared to one percent in 2012.
- Two percent offered live interactive video courses, compared to five percent in 2012.

### Blended or Hybrid Courses

- In 2013, 45 percent of respondents increased the number of blended or hybrid courses they offered each term, compared to 54 percent in 2012 and 75 percent in 2010.
- Thirty-eight percent of respondents offered about the same number of blended or hybrid courses, compared to 27 percent in 2012.
- Five percent of respondents offered blended or hybrid courses for the first time at their college, compared to two percent in 2012.
- Two percent did not offer blended or hybrid courses, which is the same as in 2012.

### Web-assisted, Web-enhanced and Web-facilitated Courses

- In 2013, 83 percent of respondents increased the number of Web-assisted, Web-enhanced, or Web-facilitated courses they offered each term, as compared to 69 percent in 2012.
- Eleven percent offered about the same number of Web-assisted, Web-enhanced or Web-facilitated courses each term, which is consistent with the past several years of the ITC survey.
- Five percent reported they do not offer Web-assisted, Web-enhanced, or Web-facilitated courses at their college.

### Interactive Video Courses

Given the growth of and focus on online courses and degrees, many surveys have overlooked more established technologies, such as interactive video classrooms. Respondents described their use of live interactive video.

- In 2013, 51 percent of respondents indicated they have deactivated their live interactive video network, or they have never offered these courses at their college, compared to 25 percent in 2012 and 40 percent in 2009.
- Twenty-one percent offer the same number of live interactive video courses as in previous terms, compared to 25 percent in 2012.
- Twenty percent have reduced the number of live interactive video courses they offer, compared to 17 percent in 2012.
- Seven percent have increased the number of live interactive video courses they offer, compared to 10 percent in 2012, 17 percent in 2010, and 26 percent in 2009.

### Massive Open Online Courses (MOOCs)

For the second year, the ITC survey asked respondents if they use MOOCs at their college, an approach to learning that has been fraught with controversy during the past year. Community colleges have historically favored offering more personalized instruction to small numbers of students. They tend to hesitate before offering courses to large class sizes, regardless of their delivery mode. Persistence from some administrators and board and trustee members, who do not want to be left behind their four-year counterparts, has encouraged some colleges to explore whether MOOCs could work at community colleges.

- In 2013, 73 percent of the ITC survey respondents indicated they have no plans for incorporating MOOC content into their online classes, compared to 42 percent in 2012.
- Three percent reported they are using MOOCs.
- Two percent plan to offer a MOOC within the next year, with 17 percent in two or more years.

- Two percent offer course credit or certificates for students who complete MOOCs, compared to one percent in 2012.

### Open Educational Resources (OERs) and Online Education

For the second year, the ITC survey included questions about the use of open educational resources (OERs) at community colleges. OERs are defined as freely-accessible, openly-formatted and -licensed materials and media that educators use for teaching, learning, assessment and research purposes. Efforts to develop open textbooks are a major undertaking for the OER movement.

*What level of impact do you expect OERs will have at our institution in the next three years?*

- Forty-five percent of respondents anticipate a significant impact, compared to 36 percent in 2012.
- Fifty percent anticipate little impact, compared to 60 percent in 2012.
- Three percent anticipate no impact, compared to four percent in 2012.

*What roadblocks do you anticipate in adopting OER solutions at your institution?*

- Seventy-six percent of respondents indicated concern about a lack of faculty awareness, compared to 66 percent in 2012.
- Seventy-seven percent indicated concern about the time needed to locate and evaluate OERs, compared to 67 percent in 2012.
- Forty-eight percent indicated concern about the credibility of sources, which is consistent with last year's percentage.
- Thirty percent indicated concern about the lack of ancillary materials, compared to 21 percent in 2012.
- Thirteen percent indicated concern about resistance from administrators, which is consistent with last year's percentage.



- Ensuring online materials are compatible with mobile devices. Keeping up-to-date with new technology.
- Identifying and implementing a cost- and technically-effective authentication system will continue to be a challenge. In addition, responding to new requirements and regulations Congress will impose at it reauthorizes the Higher Education Act.

—2013 ITC Survey Respondents

## FACULTY QUESTIONS

**Challenges.** Each year the ITC survey asks distance education administrators to rank the greatest faculty-related challenges they face. For the first six years of the ITC survey, they indicated addressing faculty workload issues was the main challenge. Since then, respondents have assigned varying levels of importance to a growing number of challenges. Two concerns topped the list as dominant challenges when the authors added them to the survey in 2012: engaging faculty in developing online pedagogy and evaluating faculty performance. Table 6 shows their responses for the past ten years.

**TABLE 6. Greatest Challenges Administrators Face Regarding Distance Learning Faculty**

Range for responses—1 is the greatest challenge, 8 is the least challenging

Challenge	Rank 2004	Rank 2005	Rank 2006	Rank 2007	Rank 2008	Rank 2009	Rank 2010	Rank 2011	Rank 2012	Rank 2013
Engaging faculty in developing online pedagogy <sup>38</sup>	-	-	-	-	-	-	-	-	1	1
Evaluation of Faculty <sup>39</sup>	-	-	-	-	-	-	-	-	4	2
Training	4	3	2	2	2	2	1	2	3	3
Workload Issues	1	1	1	1	1	1	2	1	2	4
Compensation	2	5	3	3	3	5	3	4	7	5
Technical support	5	6	5	5	4	6	4	3	5	6
Intellectual property/ ownership issues	7	7	7	7	7	7	7	6	8	7
Recruitment	6	2	6	6	6	3	6	7	9	8
Buy-in to electronically- delivered instruction	3	4	4	4	5	4	5	5	6	9

<sup>38</sup> “Engaging faculty in developing online pedagogy” was introduced as a new question in 2012.

<sup>39</sup> “Evaluation of faculty” was introduced as a new question in 2012.

**Faculty Training.** Teaching faculty to teach effectively online has been a critical component of every successful distance education program. Proper training will help faculty members and staff improve distance education course quality, provide consistency across courses which will make them easier for students to understand and navigate, help recruit other online faculty members, enhance communication with and among students, and ultimately improve student retention and success. Nearly 60 percent of the survey respondents require their faculty to participate in more than six hours of training, which is a significant increase over the past five years. However, 18 percent of respondents reported they do not require faculty training prior to their teaching an online class.

**TABLE 7. Required Faculty Training**

Number of Training Hours	Percentage
More than eight hours	43 percent
Six to eight hours	15 percent
Four to six hours	6 percent
Two to four hours	13 percent
Less than two hours	7 percent
No training required	18 percent



- Our greatest challenge is that greatly-reduced fiscal resources have limited opportunities for providing faculty and staff development and creating new curriculum and programming.
- Our college has a strong campus-wide buy-in for online learning, but we have been doing it so long that it has become routine. Administrators sometimes overlook our program as an intentional focus for continuous improvement. We need to find new spark, for something we are already doing well.
- Our college needs to emphasize the creation of systems, policies and procedures, and overall infrastructure before increasing the quantity of online classes.

—2013 ITC Survey Respondents

**Teaching Ratios for Online Instruction.** In 2013, respondents reported that 57 percent of their courses were taught by full-time faculty members. This response rate is consistent with previous years and with the historic full-time versus part-time faculty ratio which most community colleges engender. Respondents indicated that they continue to have a hard time finding qualified faculty to teach online.

**Faculty Location.** In 2013, only 20 percent of the respondents reported that their college allows their faculty from out-of-city or out-of-state locations, a decrease from 40 percent in 2010. Few administrators look beyond their own faculty members when recruiting online instructors and they tend to hire in their own backyard when they do. Most have saturated their use of existing full-time faculty and local talent. Colleges also find it difficult to recruit beyond their district and state boundaries. State authorization rules, budget reductions and push-back from on-campus faculty have contributed to these difficulties.

**Limiting the Number of Classes Taught.** ITC survey respondents indicated that most colleges limit the number of courses they allow a full-time faculty member to teach online per term. These colleges usually restrict faculty from teaching more than half of their normal full-time teaching load online. This has been consistent for the past several years. Campuses justify this practice as a way to ensure full-time faculty members will engage with colleagues and the campus community, be more readily available to students, and be more accountable for their time.



- Helping the organization think strategically about something that has historically been emergent and sporadic in nature may bring a bit of a culture shock. The college has created a five-year plan that has rigorous timelines for full online degree program development. Pushing too hard, too fast may be traumatic for the organization.
- The growing competition for online.

*—2013 ITC Survey Respondents*

**Course Ownership.** Most institutions and systems have established policies to address intellectual property rights for distance education faculty and instructional designers. Most adopt work-for-hire contracts, but intellectual property ownership can also be part of the staff person's contract negotiations, especially for those colleges that have faculty unions. In the absence of such an agreement or an expressed work-for-hire policy or a contract remedy, the content usually remains under the control of the faculty member as his or her intellectual property.

## STUDENT QUESTIONS

The ITC survey continues to affirm that student demand for online courses and degree programs continues. Administrators continue to report a chronic gap between student demand and the number of online courses their colleges offer. Budget cutbacks have exacerbated this gap by forcing distance education administrators to reduce, rather than increase, the number of online class sections their college offers, because they cannot afford to hire the faculty the need to teach them or to provide the student services the new student population would need to succeed.

Although increasing enrollments and student demand are generally good problems to have, administrators also report that many students are unprepared to learn online. Many students do not have the necessary basic computer skills they need to take online courses, misunderstand the online learning environment, and lack the study and student success skills they need to succeed. These concerns coincide with a national call to improve overall student retention and persistence rates and help more students graduate to compete in the 21st century workplace.

**Table 8: Greatest Challenges for Students Enrolled in Distance Education Classes**

Range for responses—1 is the greatest challenge, 8 is the least challenging

Challenge	Rank 2004	Rank 2005	Rank 2006	Rank 2007	Rank 2008	Rank 2009	Rank 2010	Rank 2011	Rank 2012	Rank 2013
Orientation and preparation for learning online	1	1	1	2	2	1	2	1	1	1
Providing equivalent virtual student services	4	3	4	5	5	4	5	5	2	2
Assessing online student learning and performance	2	2	2	3	1	2	1	2	3	3
Computer problems and technical support	3	6	3	4	3	3	4	4	4	4
Low student completion rate	6	4	5	6	4	6	3	3	5	5
Completion of student evaluations	5	5	6	1	6	5	6	6	6	6
Cheating	7	-	7	7	7	7	7	7	7	7
Online student recruitment	8	8	8	8	8	8	8	8	8	8
Disruptive student behavior <sup>40</sup>	-	-	-	-	-	-	-	-	9	9



- The rise of MOOCs, competency-based instruction, textbook costs, and vendors promoting services directly to faculty are of special concern.
- Moving from a focus on growth to that of quality and results. This is a challenge and an opportunity.

—2013 ITC Survey Respondent

<sup>40</sup> “Disruptive student behavior” was introduced as a new question in 2013.

**Completion Rates.** During the past nine years of the ITC survey, respondents have documented significant improvements in distance education courses—in quality, consistency, design, and structure. The results indicate distance education has also experienced an equally significant improvement in overall student retention. The trend in online retention continues to improve, but challenges remain and addressing the gap is a major priority for many programs. In 2013, administrators compared their online retention rates with that of similar face-to-face instruction at their colleges.

- Thirty-five percent of respondents reported that their retention is comparable for online and face-to-face instruction at their college.
- Fifty-three percent said retention is lower for online classes than for face-to-face instruction at their college.
- Two percent said retention is higher for online classes than for face-to-face instruction at their college.



- Student access to broadband. Internet access is still an issue in rural Kansas.
- Overcoming the belief among some faculty and students that online classes are easier to teach and pass.
- Restructuring or reimagining the college so conversations about students include discussions about online students and those who cannot come to campus. For example, student services continues to send e-mails to ask students to come to a room on campus for advising—without providing a phone number or other information.

—2013 ITC Survey Respondent

**Traditional vs. Nontraditional Students.** Given their reputation for being tech-savvy and technology-obsessed, many expect younger students to dominate online classes. However, ITC survey respondents have consistently confirmed that older students are just as likely to take online classes, especially since they tend to value the access and flexibility online courses offer them. Many older students might not be as comfortable using technology as their more youthful counterparts, but they are often more motivated to succeed, know what they want to accomplish, and have higher GPA and completion rates than those who just graduated from high school. The average number of nontraditional students who attend community colleges is 41 percent.<sup>41</sup> The ITC survey respondents noted:

- Forty-nine percent of their distance education students are traditional—aged 18-25 years.


- Forty-seven percent of their distance education students are non-traditional—older than 26 years.

**Gender.** ITC has consistently confirmed that more women than men take online classes, although the percentage of female students was 70 percent in 2004. The ITC survey respondents reported that:

- Sixty-three percent of students are female.
- Thirty-seven percent of students are male.

**Student Demand.** Colleges are doing a better job meeting student demand for online courses than they have in the past. Many have increased their online course offerings and overall student enrollment has declined, likely due to improvements in the economy. Despite this, nearly 50 percent of survey respondents state they are not meeting student demand. Since

<sup>41</sup> See Table 227 for more information. *Digest of Education Statistics*, Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics, US Department of Education. December 2013. [http://nces.ed.gov/programs/digest/d12/tables/dt12\\_227.asp](http://nces.ed.gov/programs/digest/d12/tables/dt12_227.asp)



the popularity for online learning only seems to grow, most distance education programs will continue to experience enrollment growth in the foreseeable future.

- Forty-eight percent of respondents reported that student demand for distance education courses exceeded their distance education class offerings at their college in 2013, compared to 62 percent in 2011.
- Fifty-one percent of respondents reported that their college was meeting the student demand for distance education courses in 2013, compared to 37 percent in 2011.

**Student Authentication.** When it reauthorized the Higher Education Act in 2008, Congress required distance education administrators to create “processes that establish that the student who registers in a distance education course or program is the same student who participates in and completes the program and receives the academic credit.” The Department of Education’s corresponding regulations require that accreditors make sure colleges “authenticate” their online students by requiring them to use a secure login and passcode to access their course materials, participate in proctored examinations, or use “any

new or other technologies and practices that are effective in verifying student identification.”

In 2013, 100 percent of the ITC survey respondents indicated they use a unique username and password to authenticate students. In February 2014, the Office of the Inspector General (OIG) recommended the U.S. Department of Education require colleges to take additional verification measures to authenticate students, such as requiring them to require and track a student’s high school diplomas, education transcripts, and college admission test scores. The results of these OIG recommendations might not be seen until Congress reauthorizes the Higher Education Act in 2014.

The ITC survey documents expanded exploration and use of the following:

- Eighteen percent of respondents require online students take at least one proctored exam, compared to 16 percent in 2012.
- Fourteen percent of respondents use remote video proctoring to authenticate students, compared to eight percent in 2012.
- Nine percent use additional vendor-based identity verification to authenticate students, compared to five percent in 2012.





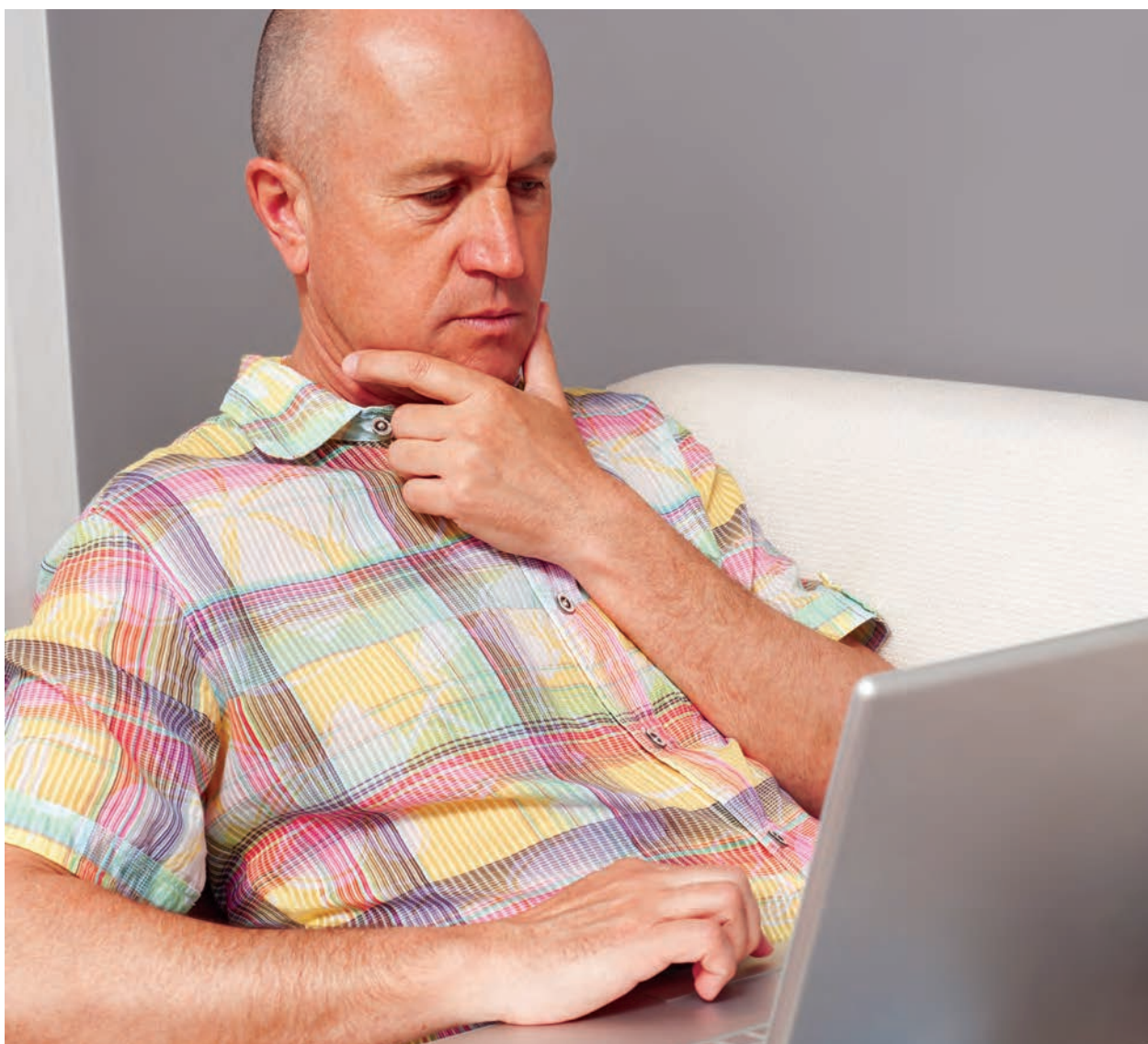
## OBSERVATIONS AND TRENDS

Since the ITC board of directors began surveying ITC members in 2004, continuity in a number of response areas has emerged. Distance education administrators face many of the same challenges—regardless of their college’s geographic location, budget, number of students, level of staff support, or whether the college is independent or part of a district or statewide system.

During the past nine years, a number of similarities have emerged:

- Student demand for online classes continues to grow at most, if not all, colleges. The percentage increase has declined recently, but only half of the colleges surveyed are able to meet student demand for distance education courses. Consequently, the authors predict student enrollment growth in online learning will continue.
- The focus for distance education programs has shifted away from simply offering some courses online to a concerted commitment toward enhancing the overall quality and integrity of the college’s online program. The need to raise online course and program quality has increased awareness of the importance of offering quality professional development and training for faculty and staff, addressing the issue of student readiness, and improving student assessment, retention and completion rates.
- The retention gap between students who learn online versus those who learn in a face-to-face classroom has narrowed dramatically during the past nine years. Many studies have shown that educators are equivalent, if not superior to traditional instruction.
- Federal rules and regulation—with regard to student financial aid fraud, state authorization, student authentication and ADA compliance—command a greater degree of administrative attention and resources.
- Many colleges are increasingly aware that they lack compliance with the accessibility requirements for online instruction outlined in sections 504 and 508 of the Rehabilitation Act.
- Online program administration has shifted so that more academic administrators, such as deans and academic vice presidents, are responsible for distance education, rather than library services or the IT department. This departmental shift helped convince many faculty to pay attention to this new modality of instruction and encouraged academic leaders to oversee online learning with respect to faculty and curricular issues.
- Distance educators have experienced dramatic, often traumatic, changes in the learning management system (LMS) market which have redefined the virtual learning environment. Colleges have replaced older systems with more sophisticated, user-friendly, cloud-based LMS solutions. Although some predicted colleges would no longer need to purchase an LMS, this core element offers a structural platform for online learning, that most administrators and faculty deem essential.
- Many distance education administrators are encouraging their colleges to restore funding for online student support services that some colleges cut during The Great Recession. They recognize that online students need to access these services, such as academic advising, library access, tutoring services, and orientation programs, to succeed. Accrediting agencies also require colleges provide equal access to these types of services to all of their students, whether the learners are located remotely or on campus.

- Although significant barriers hinder their widespread use, many administrators and faculty are increasingly interested in using open educational resources (OERs). Further buy in from educators will lead to further progress in the use of OERs in higher education.
- Most community college distance education administrators and faculty remain skeptical of massive open online courses (MOOCs) due to their low student retention rates, low teacher-to-student interaction, inability to authenticate students, and lack of financial sustainability. A few community colleges have received grant funding from private foundations to develop MOOCs that offer self-paced online orientations and remedial help, but few community colleges have created a financially-sustainable model for creating MOOCs for their students.
- Community colleges continue to embrace the full spectrum of online course applications which include fully-online, blended, hybrid, Web-assisted, Web-enhanced, and Web-facilitated courses.





## IS YOUR DISTANCE EDUCATION PROGRAM TYPICAL?

Administrators always wonder how their program compares to those at other institutions. Is it typical or consistent with national trends? Highly successful individual programs do not always reflect these generalized characteristics—variances often result from the culture of the institution and the role the distance education program is expected to play.

For most of the survey participants, their online program:

1. Is the institution's primary source for student enrollment growth.
2. Offers approximately 175 online classes/class sections each semester.
3. Enhances access to higher education, due to its increased flexibility and convenience.
4. Offers a growing percentage of Web-assisted and blended or hybrid instruction.
5. Does not offer enough courses to meet student demand.
6. Has little or no control over course offerings, degree offerings, faculty recruitment, hiring, evaluation and retention.
7. Has staff that reports to the academic side of the institution, and specifically to a dean or more highly-ranked administrator.
8. Acts as a change-agent at the institution, prompting increased faculty training and professional development, a rethinking of teaching pedagogy, and the integration of technology into instruction.
9. Is increasingly viewed as more mainstream and experiences a greater degree of organizational acceptance than in past.
10. Often leads the institution in dealing with issues of innovative course design, rigor, course quality, and keeping up with new insights as to how students learn.
11. Has experienced improvements in the amount of office space, number of staff and budget support allocated.
12. Enrolls more female than male students (in a 60-40 ratio).
13. Includes a nearly equal number of traditional and nontraditional students.
14. Deals with a growing number of state and federal government regulations.

### Typical Online Faculty Member

For most of the survey participants, their online faculty:

1. Work full-time.
2. Work on campus and also teach face-to-face classes.
3. Are recognized as good to excellent educators in the virtual and face-to-face classroom.
4. Have taught online classes for at least three years.

5. Volunteered to teach online.
6. Received at least four hours of training before teaching online for the first time.
7. Accept the importance of mapping course outcomes and fulfilling assessment expectations more readily than those who teach face-to-face classes.
8. Work to improve course quality.
9. Have a limited understanding of how to use technology, but are willing to learn.
10. Perceive the value of learning to teach online as a professional development opportunity.
11. Enjoy teaching online and views it as essential to serving students.





## INSTRUCTIONAL TECHNOLOGY COUNCIL ACTIVITIES 2012-13

- **Worked with the American Association of Community Colleges (AACC) to convince Congress to remove a proposal that would have restricted the ability of fully-online students to receive Pell grant funding to pay for their living expenses.** ITC informed its members of the impact of this proposed legislation to online learners.
- **Submitted comments and presented oral testimony to the Department of Education on financial aid fraud rings at community colleges.** ITC informed the Department and ITC members about this fraudulent activity and shared best practice steps that higher education institutions use to combat these crimes. ITC shared a discussion of technical issues and legal concerns with its members.
- **Informed ITC members on the Department of Education's proposed requirement that higher education institutions obtain state authorization to teach out-of-state distance learning students.** ITC attended national meetings on the State Authorization Reciprocity Agreement, created a special section of its Web site, and shared information, articles and resources among its members and with other higher education institutions.
- **In Fall 2013, members of the ITC board of directors and ITC staff visited congressional and senatorial offices to inform these representatives about distance education policy positions.** Talking points included: online learning bolsters student success, role of regional accreditation in distance education, financial aid fraud, reduced living allowance for fully-online veterans and military students, maintain current student authentication requirements, and support for state authorization reciprocity.
- **Served on the board of the Schools, Health and Libraries Broadband Coalition (SHLB) to inform ITC members on how the Obama administration's broadband initiatives could help their distance learning operation.**
- **Held eLearning 2013 on Feb. 17-20, 2013 in San Antonio, Texas.** Alamo Colleges was the host organization. eLearning attracted 412 registrants who came to San Antonio to exchange techniques for teaching students at a distance, showcase effective distance learning delivery methods, and various Web- and video-based technology tools for distance education. The exhibit hall included 29 vendors. eLearning 2013 featured nearly 60 professional development concurrent sessions, pre-conference workshops, general session speakers, and an exhibit hall.
- **Presented the ITC 2013 Awards for Excellence in eLearning at eLearning 2013.** Award categories included outstanding eLearning faculty, outstanding online course, outstanding student services, and outstanding eLearning student.
- **Held the 2013 Leadership Academy on July 15-17, 2013 on the campus of Erie Community College in Buffalo, New York.** The 18 participants worked with the academy faculty and members of the ITC board of directors to understand their home institutions, create a sound leadership strategy for their environment, develop a leadership model to fit their institution, identify and acquire key tools for successful leadership in distance learning and gain a network of practitioners.

- **Offered its members 36 professional development Webinars in the 2012-13 fiscal year.** The series featured weekly presentations in which distance learning experts offered practical advice to distance learning administrators, instructional designers and faculty members. Authors shared their latest distance learning research; copyright gurus and government officials explained policy guidelines distance educators must follow; accreditation experts and grant administrators discussed timely, hot topics.
- **In Fall 2012, ITC surveyed its members on the state of distance education at community colleges to provide valuable information about their programs to distance education practitioners.** In April 2013, ITC published and distributed the 32-page report, “Trends in eLearning: Tracking the Impact of eLearning at Community Colleges,” to its members, community college presidents, and press contacts. Several higher education publications featured articles about the report. This publication is freely available on the ITC Web site.
- **In Spring 2013, ITC surveyed its members to determine the extent to which their faculty and students use tablet computing devices on their campuses.** ITC posted the results of the survey to its Web site in the article, “Tracking the Use of Tablets in Community Colleges.”
- **Regularly e-mailed ITC members to inform them about distance learning articles, research, issues and trends via biweekly notices.** The e-mails included excerpts from eLearning articles featured in the national press and higher education news sources. ITC also posted links to news articles, alerts and notifications of ITC activities to its Twitter account @ITCeLearning and on its Facebook page.
- **Published a quarterly online newsletter which featured articles written by ITC members and ITC staff on distance learning best practices, activities and events at their institutions and in their region.** Visitors can search for current and past newsletter articles on the ITC Web site.
- **In April 2013, ITC presented the forum “Advancing the Completion Agenda through Innovation and Technology” at the 2013 Annual Convention of the American Association of Community Colleges.**
- **In November 2013, ITC co-presented a session “Online and Distance Education Policy Puzzlements: From 2013 to 2020,” at the Sloan Consortium International Conference on Online Learning.**
- **On December 5, ITC presented a Webinar on distance learning policy and legislation** for the distance learning directors and officers in the SUNY system in upstate New York (DOODLE).
- **On December 6, ITC presented a Webinar on distance learning policy and legislation** for the annual meeting of the Wisconsin Technical College System.
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Visit ITC’s Web site at [www.itcnetwork.org](http://www.itcnetwork.org) for more information about the Instructional Technology Council or to become a member of this national organization, whose mission is to provide exceptional leadership and professional development to its network of eLearning experts by advocating, collaborating, researching, and sharing exemplary, innovative practices and potential in learning technologies.



## ACKNOWLEDGEMENTS

The ITC board of directors hopes this annual survey continues to provide relevant data for distance education practitioners. Since the distance education landscape is constantly changing, administrators and faculty need data and information that are pertinent, consistent and relates to real-world challenges and problems to be successful.

The authors recognize that distance education is new ground for most senior college administrators, who are often asked to support new staffing, space requirements and budget requests with a fixed or shrinking budget. College administrators want to ensure they make the right decisions that will benefit their students, faculty, staff and greater community, and make the most of limited resources.

ITC prints and mails a hard copy of this survey report to every community college president in the United States. ITC also distributes the survey results to its member institutions. Many distance educators have told the ITC staff how much they value these results, but this effort would not be possible without the continued participation and support from ITC members.

The authors wish to thank all of the ITC member institutions who participated in the 2013 survey. Special appreciation goes to the ITC board of directors, for their continued support of the project and for their efforts to refine the topic areas and help draft several new questions for each annual survey. Thanks to Travis Souza, WebCollege coordinator at Truckee Meadows Community College, for creating the online survey instrument and tabulating the data during the past nine years.

In addition, we want to give special recognition to the participants at ITC's 2013 Distance Education Leadership Academy who reviewed and critiqued the survey report to identify a number of qualitative improvements. They included: Jay Castor, Theresa Gillard-Cook, Norma Chrisman, Bethany Emory, Amanda Espehschied-Reilly, Ryan Falquist, Lorah Gough, Doug Hemphill, Richard Leslie, Judith Littlejohn, Mary Meyers, Chrisie Mitchell, Cindra Phillips, Pat Ryan, Kellie Schellenberg, Shannon VanKirk, Peggy Van Kirk and Carl Weckerle.

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The Instructional Technology Council (ITC) is celebrating 37 years of providing exceptional leadership and professional development to its network of eLearning experts by advocating, collaborating, researching, and sharing exemplary, innovative practices and potential in learning technologies. An affiliated council of the American Association of Community Colleges since 1977, ITC represents higher education institutions in the United States and Canada that use distance learning technologies.

ITC members receive a subscription to the ITC list serv with information on what's happening in distance education, an electronic newsletter, discounts to participate in ITC's professional development Webinar series, distance learning grants information, updates on distance learning legislation, discounts to attend the annual eLearning Conference, and free access to ITC publications and research. Visit the ITC Web site at [www.itcnetwork.org](http://www.itcnetwork.org) for additional information, or to become an ITC member.



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