ANTELOPE VALLEY COLLEGE
DISTANCE EDUCATION AND TECHNOLOGY COMMITTEE
AGENDA
February 26, 2013
3:30 p.m. to 4:30 p.m.
L-201

To conform to the open meeting act, the public may attend open sessions

1. CALL TO ORDER AND ROLL CALL

2. OPENING COMMENTS FROM THE CHAIRS

3. OPEN COMMENTS FROM THE PUBLIC

4. APPROVAL OF MINUTES
   a. November 13, 2012 Minutes (attached)
   b. November 27, 2012 Minutes (attached)

5. ACTION ITEMS

6. DISCUSSION ITEMS
   a. Rick Shaw, Director ITS/CIO - Introduction
   b. Blackboard - Login Update; Compatible Web Browsers
   c. Babson Online Education Report (attached)

7. SUBCOMMITTEE REPORTS
   a. BE Workstation Guide
   b. Faculty Issues – Mentorship, Guidelines for Course Development; Rubric for Course Evaluation
   c. Accreditation and Other Legal Issues
   d. Website avconline.avc.edu and Data Collection

8. ADJOURNMENT

ANTELOPE VALLEY COLLEGE
DISTANCE EDUCATION AND TECHNOLOGY COMMITTEE
MINUTES
November 13, 2012
3:30 p.m. to 4:30 p.m.
BE 241

To conform to the open meeting act, the public may attend open sessions

1. CALL TO ORDER AND ROLL CALL

The October 25, 2012 Distance Education and Technology Committee meeting was called to order by Co-Chairs Dr. Nancy Bednar and Dr. Charlotte Forte-Parnell, at 3:33 p.m.

MEMBERS PRESENT

Dr. Nancy Bednar, Co-Chair	Charles Hood
Dr. Charlotte Forte-Parnell, Co-Chair	Dr. Scott Lee
Dr. Tom O'Neil	Ken Shafer
Ron Mummaw	John Toth
Brandon Zavala	Katherine Mergliano
Priscilla Jenison	Mike Wilmes
Dr. Scott Lee	Scott Tuss
Walter Briggs III	Charles Hood

GUESTS/EX-OFFICIO
Dan Scott, Ex-Officio
Diane Flores-Kagan
Greg Krynen

2. OPEN COMMENTS FROM THE CHAIRS

Dr. Nancy Bednar attended an Intelecom conference at West Los Angeles College recently, involving development of software to help students determine their status when entering community colleges – working with existing assessment to facilitate student completion of basic skills classes. Dr. Bednar learned that 60% of students use their mobile devices (smart phones) as their primary way to access the internet. Antelope Valley College (AVC) Information Technology Services (ITS) is working to make smart phone applications available for Banner and Blackboard.

Dr. Charlotte Forte-Parnell reported a resolution to technical issues in SSV 151: Joseph West found a faulty component within the amplifier that has now been replaced. A process was initiated to check the battery in the micro recorder every sixty (60) days and replace if necessary.

3. OPEN COMMENTS FROM THE PUBLIC
None.

4. APPROVAL OF MINUTES

a. October 23, 2012 Minutes
Ron Shafer made a motion and Dr. Charlotte Forte-Parnell seconded to approve the minutes of the October 23, 2012 Distance Education and Technology meeting.
Motion carried with corrections.

5. **PRESENTATION (Prof. Diane Flores-Kagan)**
   a. Learning Center Online Services
   Professor Diane Flores-Kagan spoke to the Distance Education and Technology Committee to apprise them of online opportunities for teaching and learning. Ms. Flores-Kagan has improved the Writing Center Website by including more instructional handouts, links, and interactive exercises. She distributed several handouts to the committee, briefly explaining each service. Ms. Flores-Kagan administrates four Web-based services:

   - Webspiration Classroom - for prewriting using graphic organizers and textual outlines

   - SMARTHINKING - for submitting drafts of papers to online tutors and receiving feedback. SMARTTHINKING is only used for English classes as funding allows. This program will be used in Spring, and Ms. Flores Kagan is currently negotiating the contract for next year.
   - Turnitin - for submitting papers and peer reviewing. Dr. Nancy Bednar suggested Turnitin to integrate with Blackboard. Dr. Charlotte Forte-Parnell will discuss the possibility with Sharon Lowry.

   - Learning Express - for improving reading, writing, and math skills

6. **ACTION ITEMS**
   a. Clock Issues – Ask Senate to Address Facilities
   A motion was made by Ken Shafer and seconded by Dr. Scott Lee to ask the Academic Senate to address Facilities regarding clock issues.
   Motion carried.

7. **DISCUSSION ITEMS**
   a. Cengage Learning Building Block – Mike Wilmes
   Mr. Mike Wilmes received a call from the Blackboard representative this morning: beginning next spring, Cengage will begin using Blackboard as the primary for textbooks. *Dr. Ken Lee made a motion to move the agenda item to an action item. Ms. Priscilla Jenison seconded the motion.*
   Motion carried.

   Dr. Ken Lee made a motion to give Mike Wilmes permission to put Cengage into a building block for next spring. Cengage will install their plugin into Blackboard.
   Ms. Priscilla Jenison seconded the motion.
   Motion carried.

   b. Student Complaints for Online Classes
   Dr. Nancy Bednar addressed the need for the creation of a student complaint process. She stated Accreditation will expect a student comment form available online. Dr. Tom O'Neil explained that when students call in, a student complaint form is emailed to them. Dr. Bednar stated students do not want to communicate with a Dean in order to file a complaint. Dr. O'Neil expressed the necessity to give faculty the first opportunity to address the situation. Dr. Bednar asked members to think about it and readdress at the February 12, 2013 DETC meeting.

   Mr. Brandon Zavala suggested an e-file through adobe acrobat via Blackboard.

   c. Student and Faculty Satisfaction Survey Results
   Dr. Charlotte Forte-Parnell distributed a handout with Student and Faculty Satisfaction Survey Results. Discussion was made regarding the importance of collecting a greater response. It was agreed that an incentive could help – iTunes gift card, etc. Members suggested calling this survey a pilot, and to conduct another in spring.

Approved: February 26, 2013 Distance Education & Technology Committee Meeting

Mike Wilmes suggested a pass/fail format, as opposed to web-based. Ken Shafer stated faculty and students should be informed the previous semester of the upcoming survey and requirement to participate. Dr. Ken Lee suggested a longer response time – distribute week 3, run possibly ten (10) weeks. Walter Briggs suggested multiple reminders. Dr. Tom O'Neil suggested results be distributed to the Academic Senate.

Katherine Mergliano stated Banner has the ability to create and send surveys, with links. Ms. Mergliano suggested linking the survey within the Banner frame. Brandon Zavala stated the survey needs to be shorter.

7. **SUBCOMMITTEE REPORTS**
   a. BE Workstation Guide
   None.

   b. Faculty Issues – Mentorship, Guidelines for Course Development; Rubric for Course Evaluation
   None.

   c. Accreditation and Other Legal Issues
   None.

   d. Website avconline.avc.edu and Data Collection
   None.

8. **ADJOURNMENT**
   Katherine Mergliano made a motion to adjourn the November 13, 2012 Distance Education and Technology Committee at 4:31 p.m. Dr. Ken Lee seconded the motion.
   Motion carried.

ANTELOPE VALLEY COLLEGE
DISTANCE EDUCATION AND TECHNOLOGY COMMITTEE
AGENDA
November 27, 2012
3:30 p.m. to 4:30 p.m.
BE 241

To conform to the open meeting act, the public may attend open sessions

1. **CALL TO ORDER AND ROLL CALL**
    The November 27, 2012, Distance Education and Technology Committee meeting was called to order AT 3:30 p.m. by Co-Chairs Dr. Nancy Bednar and Dr. Charlotte Forte-Parnell.

    ### MEMBERS PRESENT

Dr. Nancy Bednar, Co-Chair	Katherine Mergliano
Dr. Charlotte Forte-Parnell, Co-Chair	Ken Sawicki
Charles Hood	Dr. Tom O'Neil
Dr. Scott Lee	Dr. Scott Lee
John Toth	Scott Tuss
Priscilla Jenison	Charles Hood

    ### MEMBERS ABSENT
    Ron Mummaw
    Brandon Zavala
    Ken Shafer
    Walter Briggs III

    ### GUESTS/EX-OFFICIO
    Dan Scott, Ex-Officio
    Greg Krynen

2. **OPENING COMMENTS FROM THE CO-CHAIRS**
    Dr. Charlotte Forte-Parnell told members that a recent highlight of the recent DE survey of California Community Campuses (CCCs) revealed that 77% do not have a board-approved authentication policy, and 23.4% do.

    Dr. Charlotte Forte-Parnell announced that a random sampling of CCCs will participate in an upcoming Distance Education Student Satisfaction Survey, where 50 factors will be analyzed, including course content, instructor, and learner-to-learner items.

    Dr. Charlotte Forte-Parnell told members that State Authorization is an accreditation issue. All colleges must be in compliance with state law. Dr. Forte-Parnell stated that Accreditation and financial aid are at stake.

    Dr. Nancy Bednar informed members of the December 10, 2012 "Quality E Program" webinar. This webinar specifically designed for Chief Information Officers, Distance Education Coordinators and curriculum officials. Dr. Bednar stated members will need to pre-register, and to contact her directly if interested in attending.

Approved: February 26, 2013 Distance Education & Technology Committee Meeting

3.   **OPEN COMMENTS FROM THE PUBLIC**
     None.

4.   **APPROVAL OF MINUTES**
     a. October 13, 2012 Minutes
     Dr. Nancy Bednar postponed approval of the November 13, 2012 minutes until the February 12, 2013 Distance Education and Technology Committee meeting.

5.   **ACTION ITEMS**
     None.

6.   **DISCUSSION ITEMS**
     a. Correspondence vs. Online Course (attachment)
     Dr. Nancy Bednar told members that Mrs. Sharon Lowry recently attended a Distance Education Workshop at El Camino College.

     Dr. Bednar suggested all-electronic forms as an instructional tool for faculty, to appease Accreditation expectations. Discussion was made regarding looking at it within the union contract. A suggestion was made to send via email as a Best Practice or Guideline to enhance course instruction.

     Greg Krynen suggested sending the forms out as a guideline or training advisory style - as tools to increase course interaction.

     Dr. Bednar reiterated the importance of faculty training in order to teach online. She discussed the possible risk of dismissal for teaching online without training. Dr. Bednar addressed the need for Distance Education training, with a layout of content, extent of classes. Mr. Scott Lee questioned what resources the district would put into systemic training. Dr. Bednar suggested the possibility of faculty receiving credit to teach faculty.

     Dr. Bednar discussed the upcoming Distance Education and Technology Committee annual report to the Board of Trustees. With the union contract and past practices in mind, members considered a developmental approach to the Board regarding creating a faculty position for six (6) hours of release time to teach Distance Education to faculty. Mr. Scott Lee suggested advising the Board that DETC is concerned about Accreditation. Ms. Katherine Mergliano suggested justification for the training position creating a position to help with training siting tech review reports that are submitted to the Chancellor's office.

     b. Training -Gmail products, Windows 7 and Office 2010
     Mr. Greg Krynen discussed Google Chat capabilities. Dr. Bednar suggested that Mr. Krynen teach a Google Chat class in January 2013.

     Ms. Kathryn Mergliano stated that avctest.blackboard.com is ready.

7.   **SUBCOMMITTEE REPORTS**
     a. BE Workstation Guide
     b. Faculty Issues – Mentorship, Guidelines for Course Development; Rubric for Course Evaluation
     c. Accreditation and Other Legal Issues
     d. Website avconline.avc.edu and Data Collection

Approved: February 26, 2013 Distance Education & Technology Committee Meeting

8.   ADJOURNMENT

A motion was made and seconded to adjourn the November 27, 2012 Distance Education and Technology Committee at 4:30 p.m.
Motion carried.

Approved: February 26, 2013 Distance Education & Technology Committee Meeting

Changing Course

Ten Years of Tracking Online Education in the United States

I. Elaine Allen, Ph.D.
Professor of Biostatistics & Epidemiology, UCSF

Co-Director, Babson Survey Research Group

Jeff Seaman, Ph.D.
Co-Director, Babson Survey Research Group

January 2013

SLOAN-C

CONTENTS

ACKNOWLEDGEMENTS

PARTNERS

Pearson

Pearson has brought a wide array of experience in higher education to this project and will be producing an Infographic highlighting the results.

Pearson, the world's leading learning company, has global reach and market-leading businesses in education, business information and consumer publishing (NYSE: PSO). Pearson helps people and institutions break through to improved outcomes by providing innovative print and digital education materials, including personalized learning products such as MyLab and Mastering, education services including custom publishing, content-independent platforms including the EQUELLA digital repository, and the Pearson LearningStudio online learning platform and OpenClass online learning environment.

The Sloan Consortium

The Sloan Consortium (Sloan-C) is a long-time supporter and distributor of the national online learning reports in this series for the past nine years.

The Sloan Consortium is an institutional and professional leadership organization dedicated to integrating online education into the mainstream of higher education, helping institutions and individual educators improve the quality, scale, and breadth of education. Originally funded by the Alfred P. Sloan Foundation, Sloan-C is now a non-profit, member sustained organization.

Alfred P. Sloan Foundation

The Alfred P. Sloan Foundation is the founding sponsor of this report series. The authors wish to thank them for their support for the first eight years of this project.

The Alfred P. Sloan Foundation makes grants in science, technology and the quality of American life. It's Anytime, Anyplace Learning program seeks to make high quality learning, education and training available anytime and anywhere.

THE STUDY DESIGN, SURVEY ADMINISTRATION, ANALYSIS AND REPORT PRODUCTION FOR THIS SERIES OF ONLINE LEARNING SURVEY REPORTS ARE THE SOLE RESPONSIBILITY OF THE BABSON SURVEY RESEARCH GROUP. NO INDIVIDUAL-LEVEL DATA IS SHARED WITH PARTNER ORGANIZATIONS.

EXECUTIVE SUMMARY
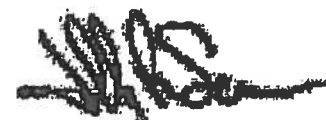
Changing Course: Ten Years of Tracking Online Education in the United States is the tenth annual report on the state of online learning in U.S. higher education. The survey is designed, administered and analyzed by the Babson Survey Research Group. Data collection is conducted in partnership with the College Board. This year's study, like those for the previous nine years, tracks the opinions of chief academic officers and is aimed at answering fundamental questions about the nature and extent of online education. Based on responses from more than 2,800 colleges and universities, the study addresses:

Massive Open Online Courses (MOOCs)

Background: *Massive Open Online Courses (MOOCs) have generated a considerable about of press coverage over the past year. While MOOCs have been around for a while, the new level of attention may have altered higher education leader's perceptions and plans for MOOCs and other online offerings.*

The evidence: Only a very small segment of higher education institutions are now experimenting with MOOCs with a somewhat larger number in the planning stages. Most institutions remain undecided.

+ Only 2.6 percent of higher education institutions currently have a MOOC, another 9.4 percent report MOOCs are in the planning stages.

+ The majority of institutions (55.4%) report they are still undecided about MOOCs, while under one-third (32.7%) say they have no plans for a MOOC.

+ Academic leaders remain unconvinced that MOOCs represent a sustainable method for offering online courses, but do believe they provide an important means for institutions to learn about online pedagogy.

+ Academic leaders are not concerned about MOOC instruction being accepted in the workplace, but do have concerns that credentials for MOOC completion will cause confusion about higher education degrees.

Is Online Learning Strategic?

Background: *Previous reports in this series noted the proportion of institutions that see online education as a critical component of their long-term strategy has shown small by steady increases over time. Does this trend continue for 2012?*

The evidence: When this report series began in 2002, less than one-half of all higher education institutions reported online education was critical to their long-term strategy. That number is now close to seventy percent.

+   The proportion of chief academic leaders that say online learning is critical to their long-term strategy is now at 69.1 percent – the highest it has been for this ten-year period.

+   Likewise, the proportion of institutions reporting online education is not critical to their long-term strategy has dropped to a new low of 11.2 percent.

How Many Students are Learning Online?

Background: *For every year of this report series online enrollments have increased at rates far in excess of those of overall higher education. The question has always been at what point will we see online enrollment begin to plateau? Overall enrollments for higher education dipped this year for the first time in years – will this translate into a slowing for online as well?*

The evidence: The number of additional students taking at least one online course grew as much this year as it did last year.

+   The number of students taking at least one online course increased by over 570,000 to a new total of 6.7 million.

+   The online enrollment growth rate of 9.3 percent is the lowest recorded in this report series.

+   The proportion of all students taking at least one online course is at an all-time high of 32.0 percent.

Does it Take More Faculty Time and Effort to Teach Online?

Background: *An earlier finding of this report series was, contrary to some expectations, teaching an online course requires more time and effort from faculty than teaching a face-to-face course. Is this still the case?*

The evidence: The perception of academic leaders of the relative effort for faculty to teach an online course has shown little change over the past six years.

+ The percent of academic leaders that believe it takes more faculty time and effort to teach online has increased from 41.4 percent in 2006 to 44.6 percent this year.

+ Private for-profit institutions are the lone group whose level of agreement has dropped (from 31.6 percent in 2006 to 24.2 percent in 2012).

Are Learning Outcomes in Online Comparable to Face-to-Face?

Background: *The reports in this series have consistently found most chief academic officers rate the learning outcomes for online education "as good as or better" than those for face-to-face instruction, but a consistent minority consider online to be inferior. Do academic leaders still hold the same opinion, given the continued growth in the numbers of online students?*

The evidence: The 2012 results show some small improvements in the perception of the relative quality of online instruction as compared to face-to-face.

+ In the first report of this series in 2003, 57.2 percent of academic leaders rated the learning outcomes in online education as the same or superior to those in face-to-face. That number is now 77.0 percent.

+ A minority (23.0%) of academic leaders continue to believe the learning outcomes for online education are inferior to those of face-to-face instruction.

+ Academic leaders at institutions with online offerings have a much more favorable opinion of the relative learning outcomes for online courses than do those at institutions with no online offerings.

Has Faculty Acceptance of Online Increased?

Background: *For the past nine years no more than one-third of chief academic officers report that their faculty accept the value and legitimacy of online education.*

The evidence: While the number of programs and courses online continue to grow, the perception of chief academic officers of the acceptance of this learning modality by faculty has decreased in the most recent year.

+ Only 30.2 percent of chief academic officers believe their faculty accept the value and legitimacy of online education. This rate is lower than the rate recorded in 2004.

+ Chief academic officers at institutions with fully online programs have the most positive view of their faculty acceptance, but even for them the proportion agreeing is less than a majority (38.4 percent).

Barriers to Widespread Adoption of Online Learning

Background: *While the majority of academic leader cite online education as critical for their long-term strategy, they also continue to express concerns about a number of barriers that will impact the growth on online.*

The evidence: In addition to the lack of faculty acceptance, covered elsewhere in this report, academic leaders express concerns about the need for more discipline on the part of online students and lower retention rates.

+ The proportion of academic leaders who cite the need for more discipline on the part of online students as a barrier has increased from just over 80 percent in 2007 to 88.8 percent in 2012.

+ The perception of a majority of chief academic officers at all types of institutions is lower retention rates for online courses remain a barrier to the growth of online instruction.

+ The proportion of academic leaders who believe a lack of acceptance of online degrees by potential employers is a barrier has remained at just over 40 percent.

WHAT IS ONLINE LEARNING?

The focus of this report is online education. To ensure consistency the same definitions have been used for al ten years of these national reports. These definitions were presented to the respondents at the beginning of the survey and then repeated in the body of individual questions where appropriate.

Online courses are those in which at least 80 percent of the course content is delivered online. Face-to-face instruction includes courses in which zero to 29 percent of the content is delivered online; this category includes both traditional and web facilitated courses. The remaining alternative, blended (sometimes called hybrid) instruction has between 30 and 80 percent of the course content delivered online. While the survey asked respondents for information on all types of courses, the current report is devoted to only online learning.

While there is considerable diversity among course delivery methods used by individual instructors, the following is presented to illustrate the prototypical course classifications used in this study.

Schools may offer online learning in a variety of ways. The survey asked respondents to characterize their face-to-face, blended, and online learning by the level of the course (undergraduate, graduate, non-credit, etc.). Similarly, respondents were asked to characterize their face-to-face, blended, and online program offerings by level and discipline.

SURVEY FINDINGS

Massive Open Online Courses (MOOCs)

Over the last year we have seen the growth in MOOCs with the creation of non-profit organizations (Mitx, Edx) or for-profit commercial entities (Coursera, Udacity) partnering with multiple institutions and creating an online platform for course enrollment and distribution. Although the concept of Massive Open Online Courses has been around for some time, and the term MOOC was coined in 2008 by Dan Barwick[1], this year's survey finds only 2.6 percent report they currently offer MOOCs and slightly less than ten percent (9.4%) have plans to offer them. An additional one-third of all institutions report they have no plans for adding MOOCs (32.7%), leaving the bulk of all institutions (55.4%) still undecided. Matching the pattern of offerings of online courses and programs over the last ten years, it is the public universities that currently have the higher rates of offering MOOCs (4.7%) and the private, for profit schools are most likely to be in the planning stages (15.0%).

Plans for MOOCs - 2012

- No Plans
- Not Decided
- Planning
- Have
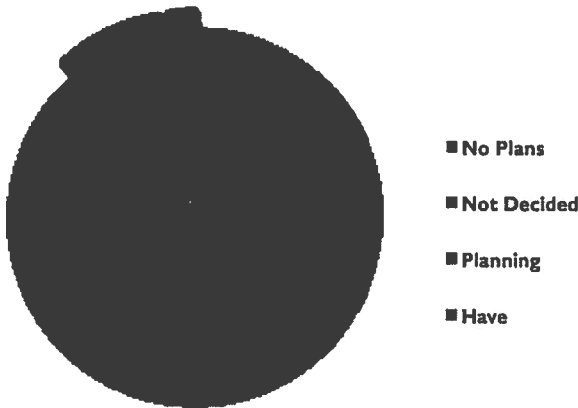
When examined by Carnegie classification, it is the research universities (Doctoral/ Research institutions) that are in the lead. They are almost twice as likely to be offering MOOCs or planning to offer MOOCs (9.8% vs. the next highest of 4.5% for Specialized institutions in offerings and 21.4% vs. the next highest of 11.8% for Master's level institutions for planning).

Plans for MOOCs - 2012
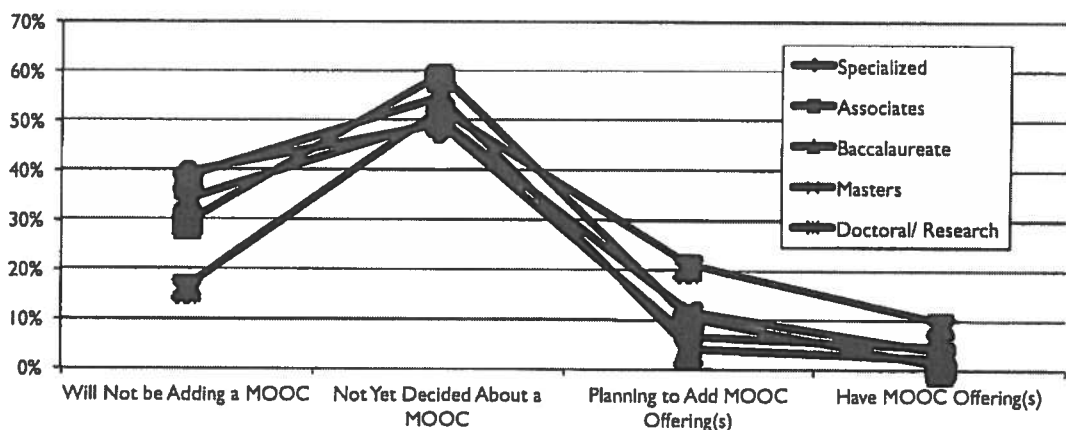
[1] Barwick, Daniel W.. "Views: Does Class Size Matter?". Inside Higher Ed. Retrieved October 3, 2011.

There is also a relationship between the size of the institution and whether or not they have or are planning on a MOOC. The largest schools (15000+ total students) have a higher rate of offering MOOCs (8.9%) and over twenty percent (21.4%) are in the planning stage.

Although the planning of MOOCs appears to follow the same pattern of adoption as for online courses and programs, it is the institutions with no current online offerings that have taken an early lead in actually offering MOOCs. Paradoxically, these are the type of institutions that are also in the majority of schools that are not planning to ever offer MOOCs. Institutions with online courses and full programs are in the majority of schools planning to offer MOOCs (13.2% vs. 4.0% vs. 3.2%).

Plans for MOOCs - 2012
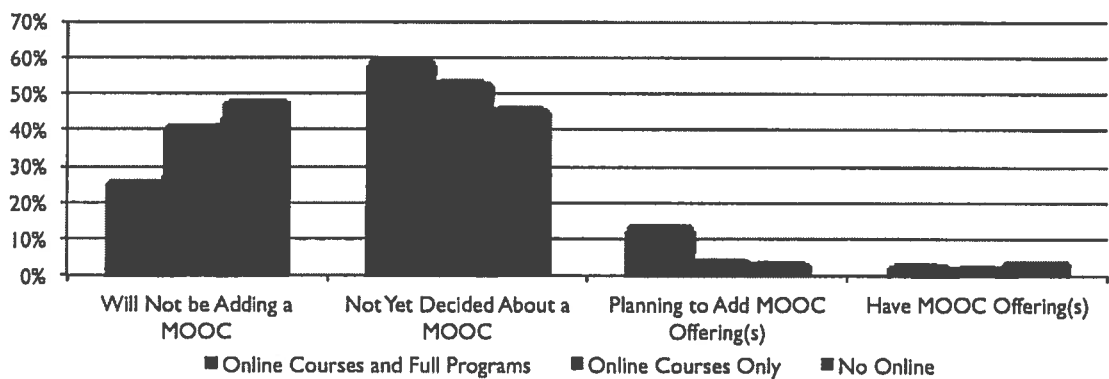
Among those institutions that are planning or currently offering MOOCs, over half (50.2%) in the planning stage intend to work or partner with an outside organization to offer their MOOCs. This is a greater proportion planning to work with others than among those that already have a MOOC (37.0%).

Percent Working with Others on a MOOC - 2012
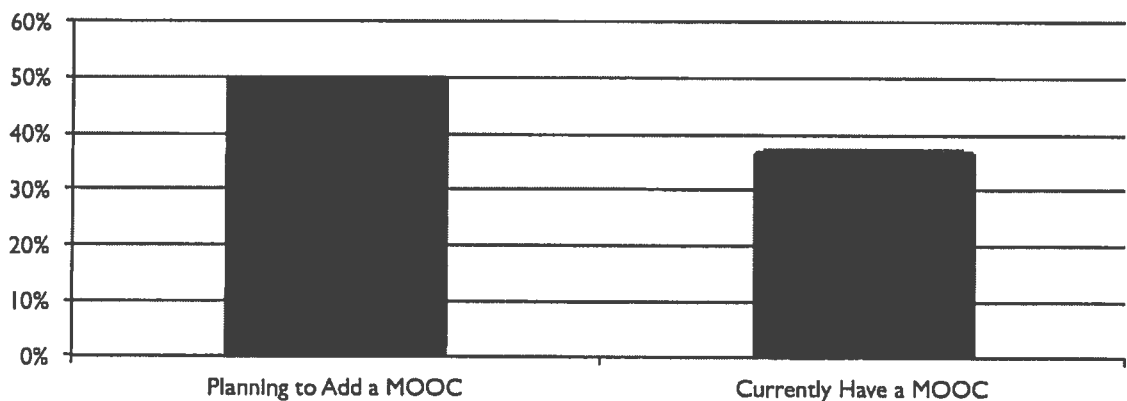
Chief academic officer's opinions about the sustainability, scalability, and acceptance of MOOCs in higher education are diverse. Responses on these issues show many institutions are still on the sidelines with a "Neutral" response.

Overall, academic leaders are split in their opinions about MOOCs as a sustainable method for offering courses with 27.8 percent agreeing, 27.0 percent disagreeing, and most Chief Academic Officers (45.2%) neutral. However, almost twice as many respondents who will *not* be adding any MOOCs (39.7%) believe MOOCs are not a sustainable method than those institutions that are undecided (21.5%) or in the planning stages (18.1%) with those already offering MOOCs at 21.7 percent. It is somewhat surprising that chief academic officers at public institutions, with the highest percent of institutions already offering MOOCs, also represent the highest percent of institutions believing MOOCs are *not* a sustainable method for offering courses. The opinions of the sustainability by Carnegie classification shows Baccalaureate institutions have the highest level of disagreement. However, among all types of institutions, "Neutral" is the modal opinion.

MOOCs Are a Sustainable Method for Offering Courses - 2012
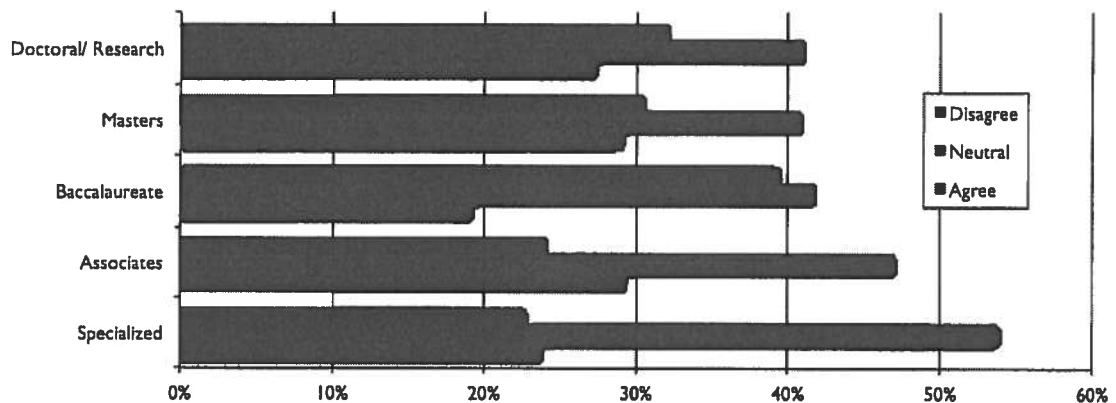
Whether or not an institution already offers online courses and/or full programs does influence the opinion of MOOCs as a sustainable method. While the modal response continued to be "Neutral," only 18.5 percent of institutions with no online offerings agreed MOOCs were sustainable compared to 30.7 percent of institutions with online courses and 28.7 percent for institutions with online courses and full programs.

There is relatively high level of agreement among chief academic officers that MOOCs represent an important way for institutions to learn about online pedagogy. Less than 20% of all institutions disagree with this statement and this is also seen when examined by type of institution (Private for-profit, Private nonprofit, or Public). There are some changes in the distribution of opinions when Carnegie classification is used to divide the respondents. Chief academic officers in Baccalaureate and Masters-level institutions are more likely to disagree that MOOCs are important for learning about online pedagogy (22.0% and 22.9%, respectively, and Doctoral/Research institutions are most likely to agree (60.0%). Here again, schools with no online offerings are the least likely to see MOOCs as pedagogically important (40.6%).

MOOCs Are Important for Institutions to Learn About Online Pedagogy - 2012
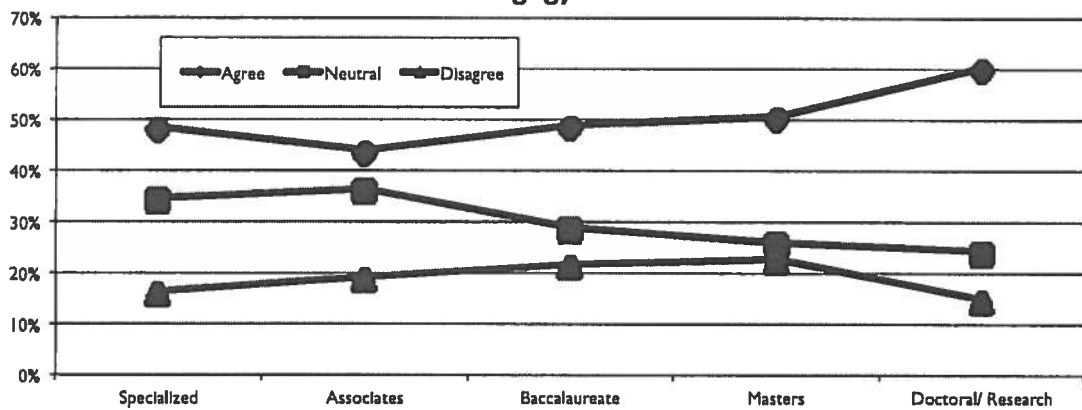
Do MOOCs help us understand the scalability and demand for online courses? Academic leaders at institutions that offer online courses and/or fully online programs overwhelmingly agree they do (60.0% with online courses or full programs and 57.8% of institutions with online courses) but only 42.2 percent of those at institutions with no online presence agree. Less than half the private for-profit institutions agree with the statement (47.4%), perhaps because they are already deeply entrenched in offering online courses and programs and do not see the gain from entering this (free) market.

It is interesting that only a minority of chief academic officers believe MOOCs have the potential to attract potential students to their institutions (43.5% overall). Given this response, it may be surprising that institutions are entering this type of course offering at all. Perhaps they are taking the longer view and see this as an alternative revenue stream for the future or as a way to build their institution's brand awareness. Even schools with fully online programs have only a slim majority (50.4% agreeing) that believe students will be attracted to an institution based on enrollment in a MOOC. When examined by size of institution, some differences are evident. The largest schools agree MOOCs may attract students (59.6%) but there is no clear pattern by size among the smaller schools. Only the respondents of mid-size schools (3,000 – 7,500) also have a majority who agree (57.7%).

MOOCs Can be Used to Attract Potential Students - 2012
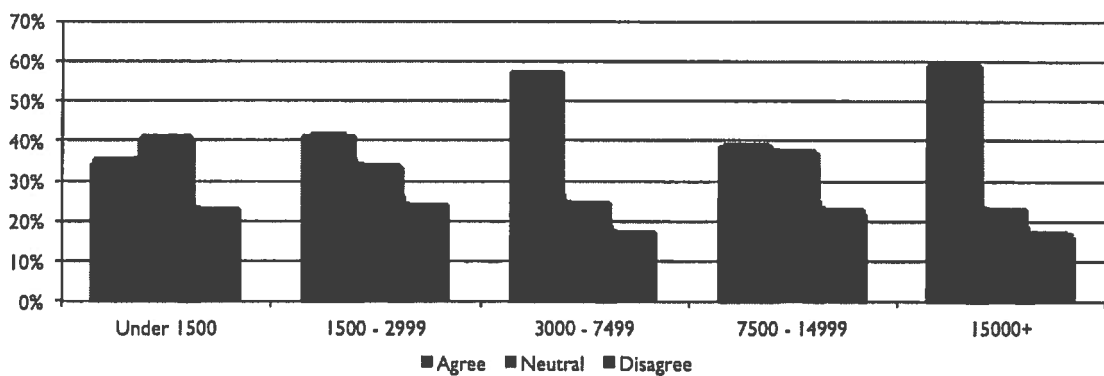
A small majority of chief academic officers agree MOOCs are good for students to determine if online instruction is appropriate for them, with an equal number either neutral or disagreeing (50.6% agree vs. 30.9% neutral and 18.6% disagree). These percentages are relatively consistent across type of school and Carnegie classification but the responses show some differences by size of institution and presence in online offerings. Smaller and mid-sized institutions are more likely to believe MOOCs offer a way for students to determine if online instruction is appropriate while the largest institutions disagree. Possibly because the larger institutions already offer many online courses and programs, these institutions believe their students are already familiar with online instruction. However, respondents from schools with online courses or both courses and programs show a higher percent of agreement than schools with no online presence (53.4%, 50.7% and 41.7%, respectively).

MOOCs are Good for Students to Determine if Online Instruction is Appropriate - 2012

	Under 1500	1500 - 2999	3000 - 7499	7500 - 14999	15000+

With respect to the acceptance of MOOC coursework in the workplace, only a minority of respondents do *not* believe this coursework will be accepted. Here again, it is the chief academic officers at schools with no online offerings that show the largest percent agreement that MOOC instruction will not be accepted (30.3% vs. 17.7% for schools with online courses and 17.0% for schools with online courses and programs).

MOOC Instruction Will Not be Accepted in the Workplace - 2012

- Agree
- Neutral
- Disagree
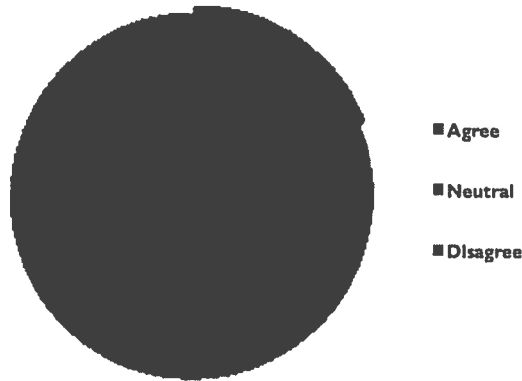
Not surprisingly, many respondents for all types and sizes of schools believe credentials for MOOC completion will cause confusion about higher education degrees (55.2% overall). Schools having no online courses show the highest agreement (67.0%) followed by Baccalaureate institutions with 62.4 percent, Doctoral/Research universities with 60.9 percent, and private, for-profit schools with 57.7 percent agreeing MOOC credentials will cause confusion about higher education degrees. A majority of every group of academic leaders agree that credentials for MOC completion will cause confusion.

Percent Agreeing: Credentials for MOOC Completion Will Cause Confusion - 2012

	Specialized	Associates	Baccalaureate	Masters	Doctoral/ Research
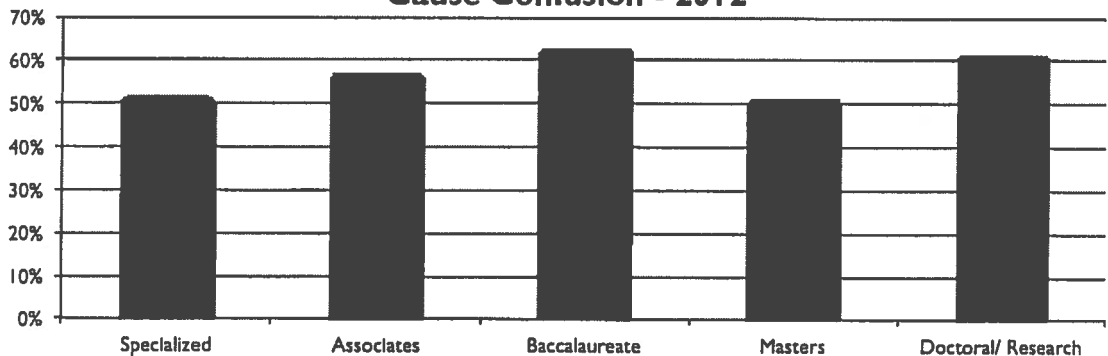
Are We Heading for Online 2.0?

Are MOOCs the next paradigm for online education? Will we now begin to see a rethinking of online course structure and delivery? To explore the readiness of institutions to evolve their online, chief academic officers at institutions with online offerings were asked to rate their institution's potential. The academic leaders were queried as to how they would rate their own institution versus others on the ability to scale their online offerings and their ability to harness online technology to develop new and innovative courses.

Approximately one-third of chief academic officers at institutions with online offerings currently believe their institution is *Above Average* or *Somewhat Above Average* in their ability to scale their online offerings (34.7%) or to use online technology to develop innovative new courses (32.6%).

Rank: Ability to Scale Our Online Offerings - 2012

- Above Average
- Somewhat Above Average
- Average
- Somewhat Below Average

Rank: Use Online Technology to Develop Innovative New Courses - 2012

- Above Average
- Somewhat Above Average
- Average
- Somewhat Below Average
- Below Average
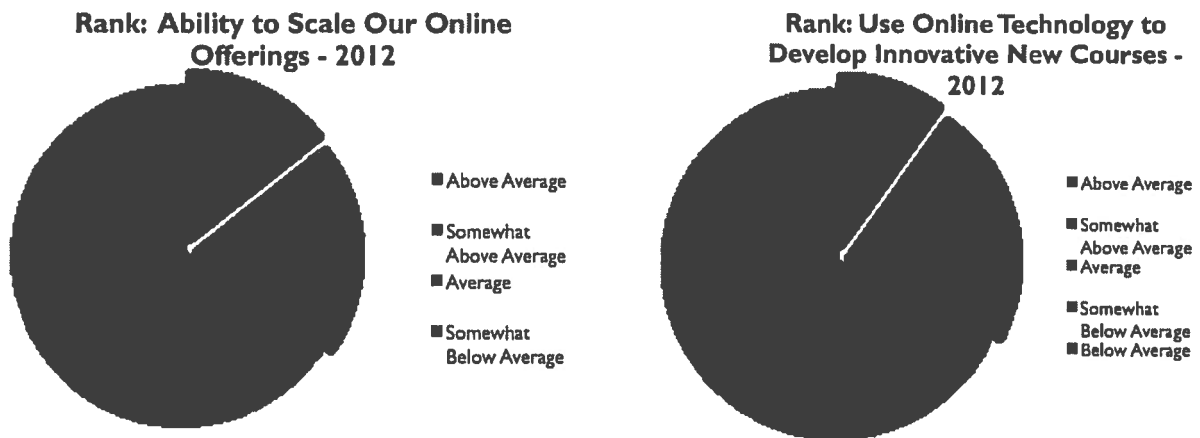
Larger institutions (as measured by total enrollment) see themselves in a better position to scale their online offerings. Over forty-five percent of institutions with 7,500 or more total students rank themselves as *Above Average* or *Somewhat Above Average* in their ability to scale their online offerings. This compares to only about thirty percent of the smaller institutions (under 3,000 total enrolments) that rank themselves thus.

Rank: Ability to Scale Our Online Offerings - 2012

- Above Average
- Somewhat Above Average
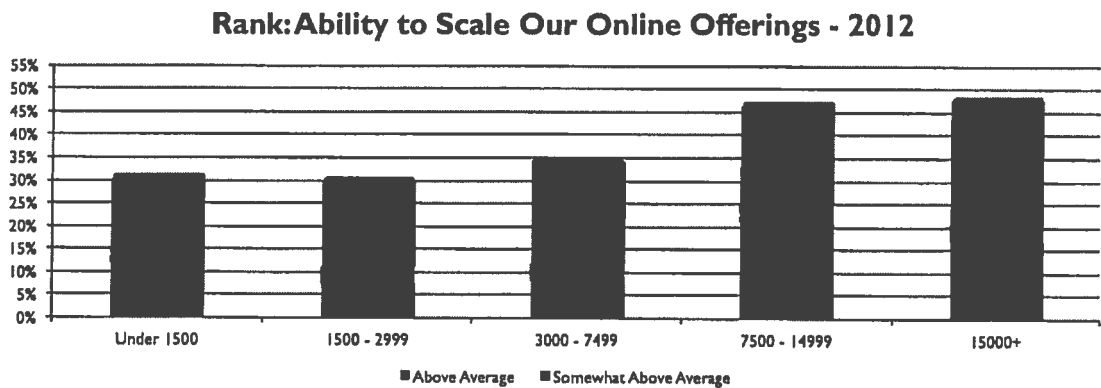
Larger institutions also see themselves in a better position to develop innovative new courses. Nearly forty-five percent of institutions with 7,500 or more total students rank themselves as *Above Average* or *Somewhat Above Average* on this dimension.

Rank: Use Online Technology to Develop Innovative New Courses - 2012
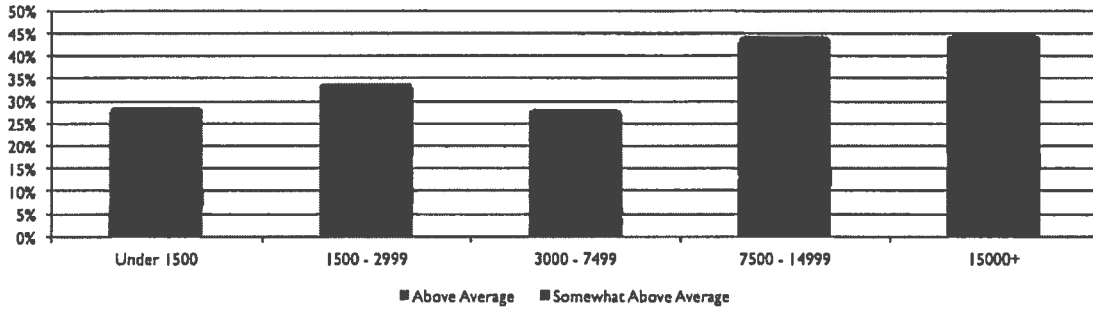
When examined by Carnegie classification, it is the two-year Associates institutions that believe themselves to be in the lead to scale their offerings and the Doctoral/Research that feel they are best prepared to develop innovative new courses.

Rank: Ability to Scale Our Online Offerings - 2012
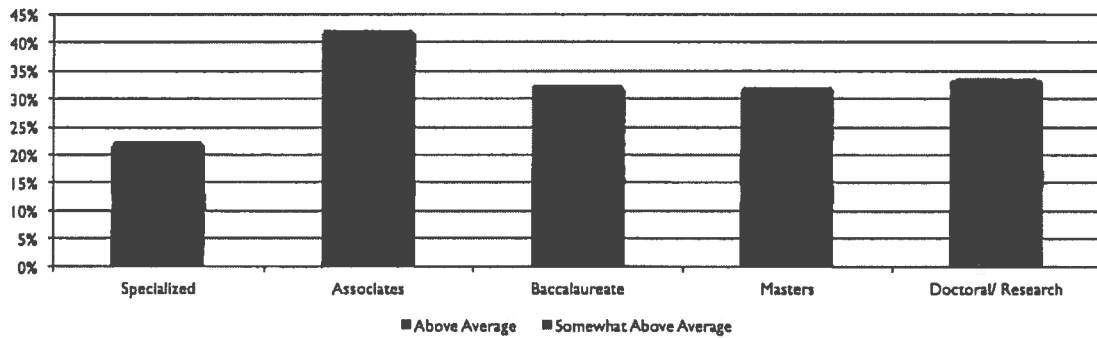
Rank: Use Online Technology to Develop Innovative New Courses - 2012
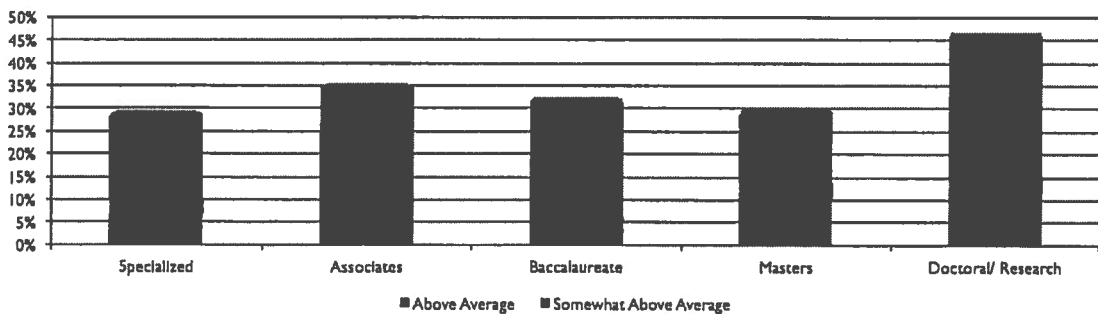
Is Online Learning Strategic?

When this report series began in 2002, less than one-half of all higher education institutions reported online education was critical to their long-term strategy. That number is now close to seventy percent. After remaining steady for a number of years, the proportion of chief academic officers reporting online education is critical to their institution's long-term strategy displayed small increases for each of the previous three years - a trend that continues this year. The percentage of institutions that agree "Online education is critical to the long-term strategy of my institution" reached its highest level in 2012 (69.1%). The percent disagreeing has held steady at just over ten percent for all ten years of the survey.

Online Education is Critical to the Long-term Strategy of my Institution – Fall 2002 to Fall 2012
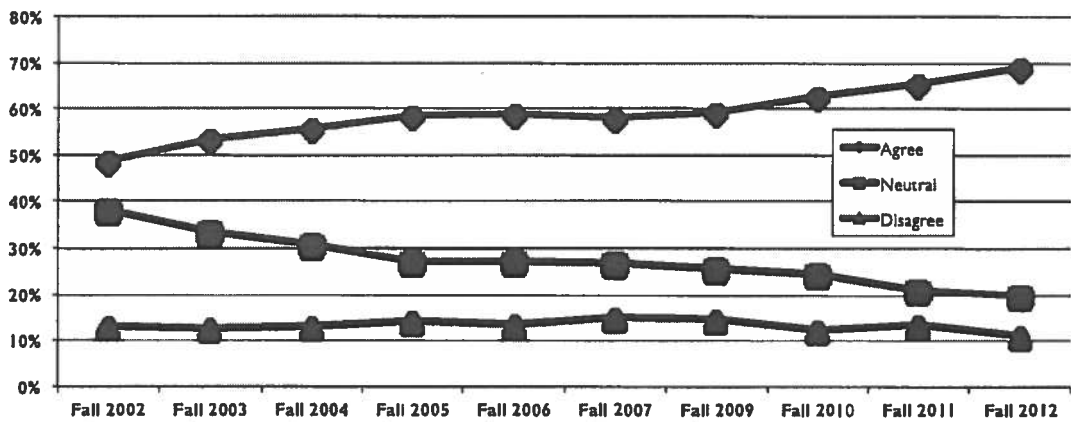
As noted in previous reports, not all institutions that profess to believe online education is critical also include online as a component of their strategic plan. There has been a consistent "gap" between those who profess online is critical and those that have specifically included online within their strategic plan. This year is no different – just over sixty percent of those institutions with full online programs say online significantly represented in their strategic plan. Among those with only online courses, the number is even lower (30.4%).

Percent Agreeing: Online Education is Significantly Represented in My Institution's Formal Strategic Plan

How Many Students are Learning Online?

For years the number of postsecondary students in the United States has increased – driven by both demographics (the increasing number of persons graduating from high school) and economic factors (where bad economic times are often good for higher education enrollments). However, higher education made news this year when it was reported that the total number of students enrolled at U.S. higher education institutions had actually dropped[2].

In the face of the softening in the growth of overall enrollments the number of students taking at least one online course continued to increase at a robust rate. There were 572,000 more online students in fall 2011 than in fall 2010 for a new total of 6.7 million students taking at least one online course. This is a slightly larger numeric increase as seen for fall 2009 to fall 2010. It also is very close to the average increase seen for each of the last nine periods (which produced an average growth of 568,000 students per year).

Total and Online Enrollment in Degree-granting Postsecondary Institutions – Fall 2002 through Fall 2011

	Total Enrollment	Annual Growth Rate Total Enrollment	Students Taking at Least One Online Course	Online Enrollment Increase over Previous Year	Annual Growth Rate Online Enrollment	Online Enrollment as a Percent of Total Enrollment

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[2] Beckie Supiano, "College Enrollment Dropped Last Year, Preliminary Data Show", The Chronicle of Higher Education, October 9, 2012.

While the absolute number of additional students taking online courses continues to increase at rates similar to previous years, the percentage growth that this represents is lower because the growth is now on a much larger base. The most recent estimate, for fall 2011, shows an increase of 9.3 percent in the number of students taking at least one online course, which is the lowest rate of growth observed over the study time period. While the growth rate may be slowing, it is still well in excess of the growth of the overall higher education student body. The increase from 1.6 million students taking at least one online course in fall 2002 to the 6.7 million for fall 2011 represents a compound annual growth rate of 17.3 percent. For comparison, the overall higher education student body has grown at an annual rate of 2.6 percent during this same period – from 16.6 million in fall 2002 to 21.0 million for fall 2011[3].

Total and Online Enrollment in Degree-granting Postsecondary Institutions: Fall 2002 - Fall 2011
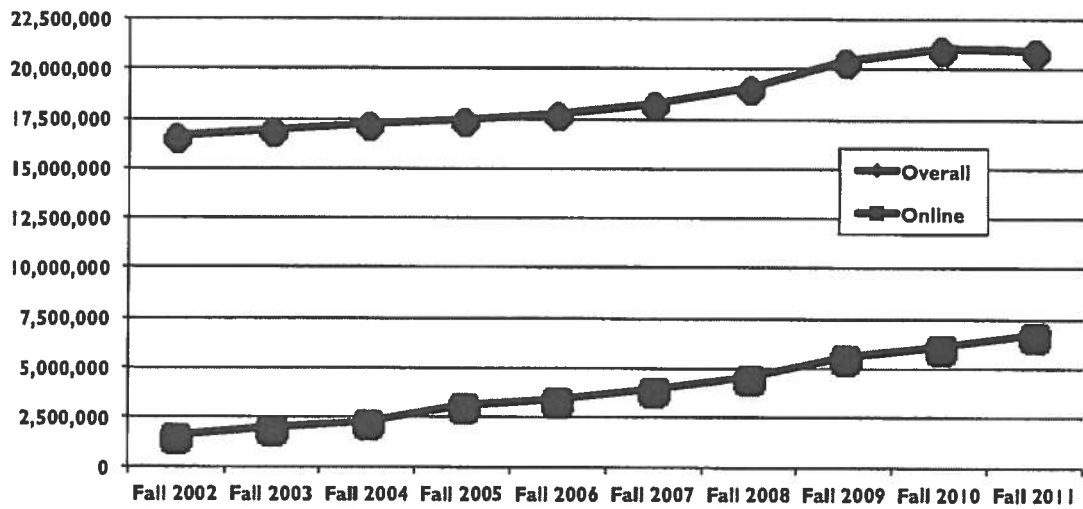
Last year this report speculated the slower rate of growth in the number of students taking at least one online course might have been the first sign that the upward rise in online enrollments was approaching a plateau. The results this year show that while the growth rate may be slowing, there has been no drop in the numeric increase in the number of online students. And, while lower than previous years, a growth rate approaching ten percent on the larger current base of students is still substantial. A plateau for online enrollments may be approaching, but there is no evidence that it has yet arrived.

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[3] Projections of Education Statistics to 2020, National Center for Education Statistics

The proportion of higher education students taking at least one online course now stands at 32 percent. For comparison, the first year of this study (fall 2003) found slightly less than ten percent of all higher education students were taking at least one online course. The proportion has continued its steady increase almost linearly over this ten-year time span[4].

Online Enrollment as a Percent of Total Enrollment: Fall 2002 - Fall 2011

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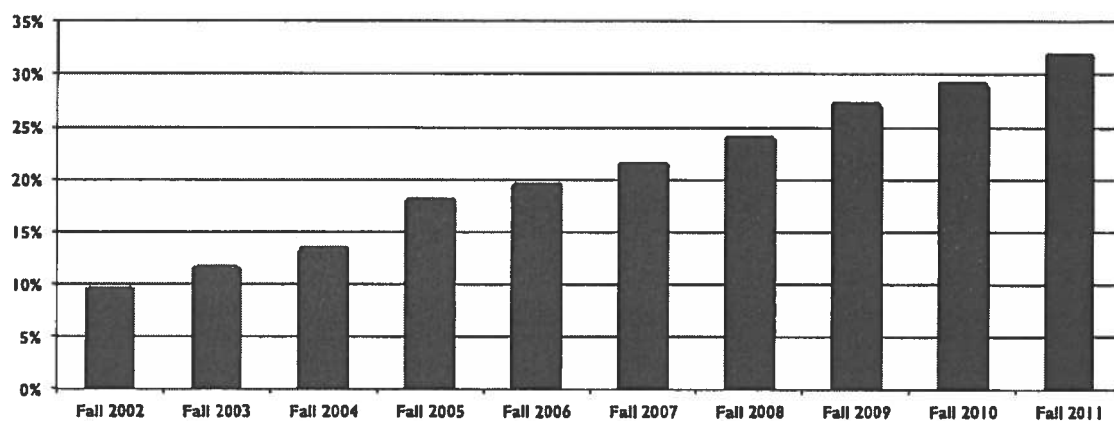
[4] Note the percentage of students taking at least one online course has been recalculated as compared to previous reports to reflect revised overall enrollment numbers from the National Center for Educational Statistics.

Who Offers Online?

The first report in this series measured at total of 1.6 million higher education students in fall 2002 who were taking at least one of their courses online. Every year since then that number has shown a substantial increase. What is producing this growth – is it due to institutions that had no online offerings in 2002 entering the online market, does it come from those pioneering institutions that have continued to grow the size of their offerings over time, or does it come from the for for-profit sector growing their institutions?

Even ten years ago the vast majority (71.7%) of higher education institutions had some form of online offering, leaving only 28.3 percent without any online. The number of institutions with no online has dropped to less half this value for 2012 (13.5% with no online offerings in 2012). A major change has also occurred in the nature of the online offerings – a far larger proportion of higher education institutions have moved from offering only online courses to providing complete online programs (62.4% in 2012 as compared to 34.5% in 2002).

Type of Online Offerings - 2002

- Online Courses and Full Programs
- Online Courses Only
- No offerings

Type of Online Offerings - 2012

- Online Courses and Full Programs
- Online Courses Only
- No offerings
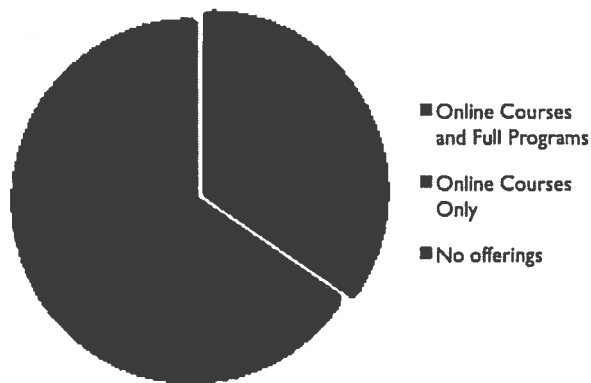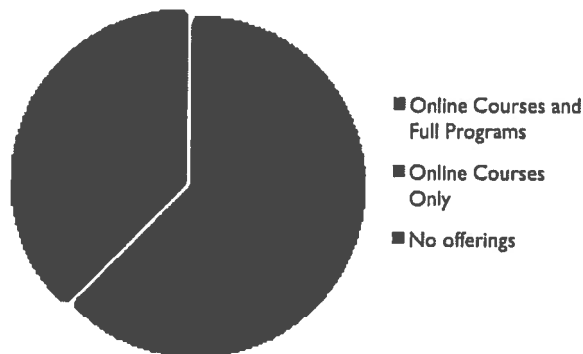
In what type of institutions has this change occurred? Virtually all public institutions had online offerings in 2002, so the overall growth in the number for 2012 was small. One big change for these schools was the big gain in the proportion whose online offerings now include complete online programs (48.9% in 2002 and 70.6% in 2012). The number of private nonprofit institutions with online offerings had the greatest increase, with a doubling of the proportion with full online programs (from 22.1% in 2002 to 48.4% in 2012).

Type of Online Offerings - 2002 and 2012

■ Online Courses and Full Programs   ■ Online Courses Only
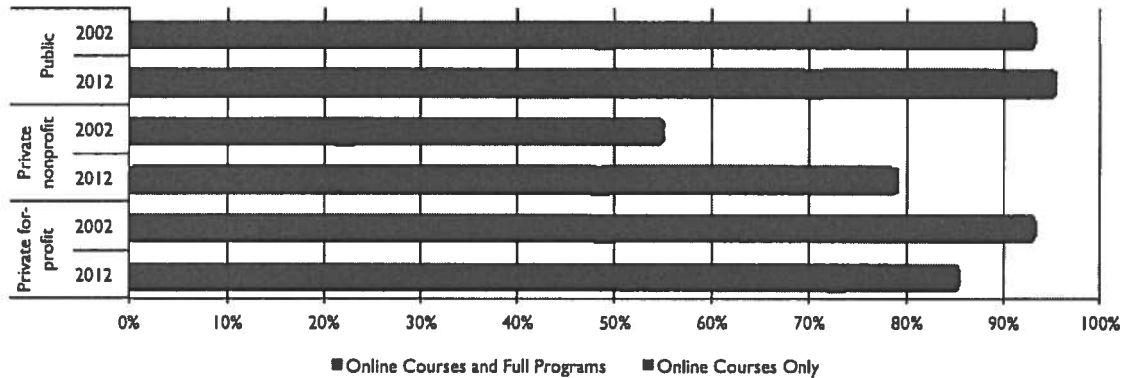
Because almost all higher education institutions were already offering some form of online in the fall of 2002 the growth in online enrollments could not have come from an influx of new schools with online offerings. While there were a number of colleges and universities with online in 2012 that did not have these offerings in 2002, they are among the very smallest institutions (less than 1500 total enrollments), and thus did not have any major impact on the overall online enrollment totals. The continued growth in online enrollments has come from the transition of institutions with only a few online courses moving to offer fully online programs, and from institutions with online programs expanding their offerings and building their enrollments.

Type of Online Offerings - 2002 and 2012

■ Online Courses and full programs   ■ Online Courses Only
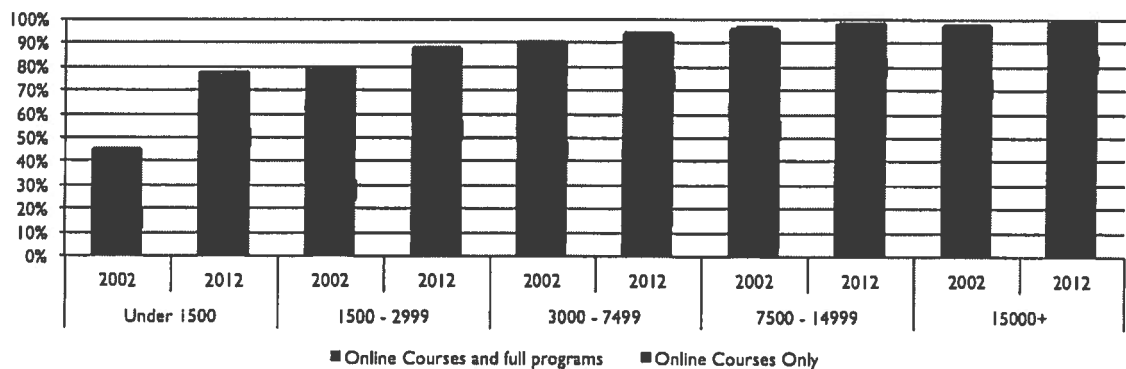
Does it Take More Faculty Time and Effort to Teach Online?

Even in the pre-MOOC days, one of the hopes for online education was that it might be a more efficient means for delivering education. The theory was that faculty could teach far more students by taking advantage of the new technology. However, before the advent of MOOCs, the prototypical online course in U.S. higher education over the past decade has not been structured to provide large increases in efficiency. Most online courses are very similar in design to existing face-to-face courses. These courses typically run on the same semester schedule, cover the same corpus of material, represent the same number of credit hours, and are led by a single faculty member who is directly interacting with his or her students.

One result of building online courses that mirror the existing face-to-face framework has been they place additional demands on the faculty that teach them. Academic leaders are well aware of this – they report they believe it takes more time and effort for a faculty member to teach on online courses than to teach a corresponding face-to-face course. In 2006 40.7 percent of academic leaders reported they believed that it required more faculty time and effort to teach an online course. Six years later the belief is held even more strongly – the most recent results show 44.6 percent of chief academic officers now report this to be the case, with only 9.7 percent disagreeing.

It Takes More Faculty Time and Effort to Teach an Online Course Than a Face-to-Face Course - 2012

- Agree
- Neutral
- Disagree
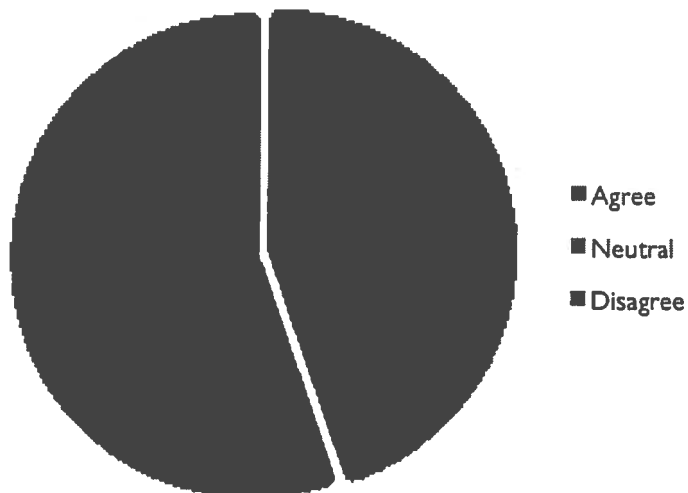
Those academic leaders with greater exposure to online teaching are more likely to report it takes more time and effort to teach online. Academic leaders at institutions that do not have any online offerings (and can therefore be assumed to have less direct evidence of the level of effort required) do hold a somewhat more positive view. Eighteen percent of these leaders disagree that it takes more time and effort (as compared to 9.7 percent for the overall sample).

One group of institutions, those that are for-profit, display a very different trend from other colleges and universities. While more public institutions (55.2% in 2012 compared to 44.8% in 2006) and nonprofit institutions (45.3% in 2012 compared to 41.4% in 2006) now agree it takes more time and effort for faculty to teach online courses, the results for for-profit institutions have moved in the other direction. In 2006 for-profit institutions had a level of agreement (31.6%) that was already significantly lower than those for other types of institutions. While the level of agreement to this statement for pubic and nonprofit institutions increased between 2006 and 2012, it decreased at for-profit institutions. The percent of academic leaders at for-profit institutions agreeing it takes more time and effort to teach online courses had dropped from 31.6 percent in 2006 to only 24.2 percent for 2012.

Percent Agreeing it Takes More Faculty Time and Effort to Teach an Online Course - 2006 and 2012

■2006 ■2012
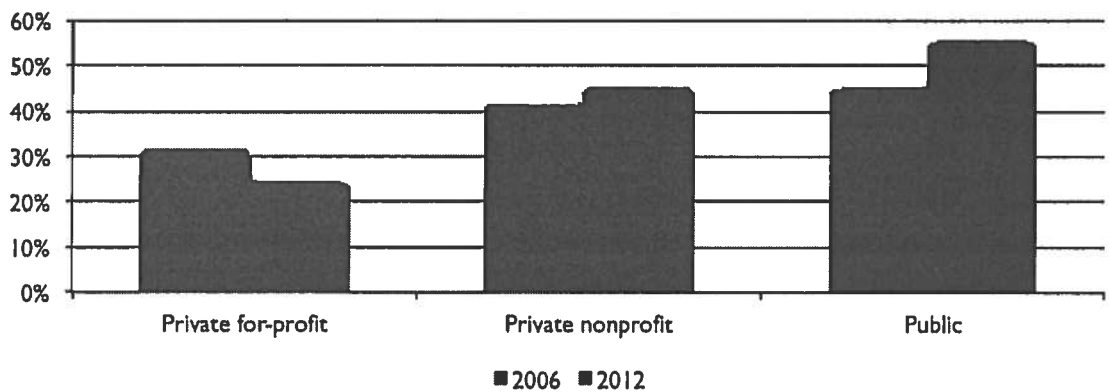
It may be that for-profit institutions have invested heavily in online learning – basing much of their growth on building online programs. By building online courses from scratch, and designing them to be taught by a large number of (perhaps adjunct) faculty, they may have better optimized the level of effort that will be required.

Are Learning Outcomes in Online Comparable to Face-to-Face?

The view that online education is "just as good as" face-to-face instruction is decidedly mixed. The period of 2003 through 2009 displayed a small decrease in the proportion of chief academic officers reporting the learning outcomes for online education were *Inferior* or *Somewhat Inferior* to those for comparable face-to-face courses. This proportion then held relatively steady between 2009 and 2011. Results for 2012 show a substantial improvement in the opinion of academic leaders on the relative quality of the learning outcomes for online education. The percent reporting that outcomes are *Inferior* or *Somewhat Inferior* dropped from 32.4 percent in 2011 to only 23.0 percent for 2012. Much of this drop was among those saying online learning was *Inferior*.

Proportion Reporting Learning Outcomes in Online Education as Inferior Compared to Face-to-face: 2003 - 2012
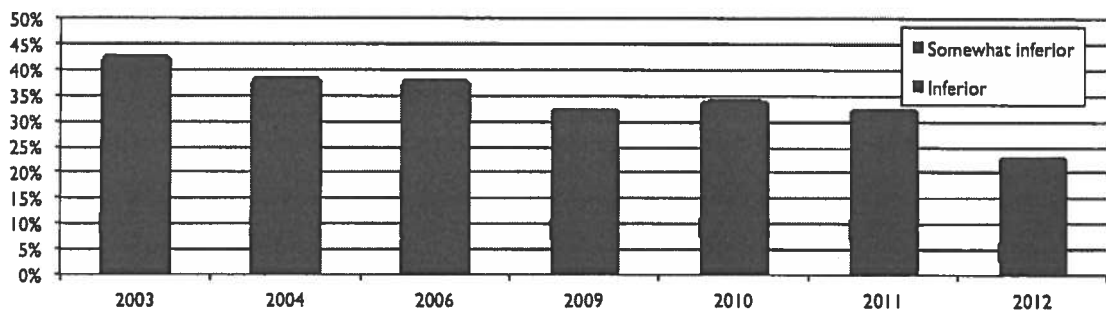
While there has been a recent increase in the proportion of academic leaders that have a positive view of the relative quality of the learning outcomes for online courses as compared to comparable face-to-face courses, there remains a sizable minority that continue to see online as inferior. Over three-quarters of academic leaders believe online is "just as good as" or better. However, this means almost one-quarter of all academic leaders polled continue to believe the learning outcomes for online courses are inferior to those for face-to-face instruction.

A consistent finding over the ten years of these reports is the strong positive relationship of academic leaders at institutions with online offerings also holding a more favorable opinion of the learning outcomes for online education. Results for 2012 continue this trend – chief academic officers at institutions without any online offerings are five times as likely as those at institution with fully online programs to report online learning outcomes are *Inferior* or *Somewhat Inferior* to those for comparable face-to-face courses. It continues to be the case that the more extensive the online offerings at an institution, the more positive their leaders rate the relative quality of online learning outcomes.

Proportion Reporting Learning Outcomes in Online Education as Inferior Compared to Face-to-face: 2012

It remains unclear, however, if it is that institutions with a positive opinion towards online are more likely to implement online courses, or if it is that institutions with experience with online develop a more positive attitude as their experience grows. Regardless of the causal order, is remains clear academic leaders at institutions with online offerings have a much more favorable opinion of the learning outcomes in online courses and programs than those at institutions without online offerings.

It is important to understand that chief academic officers are reporting their personal *perceptions* about the relative quality of online and face-to-face instruction. In some cases these academic leaders may be basing their opinions on detailed analysis of the offerings at their own institutions. For others the opinion may only be based conversations with peers, what they have read in the press, or any number of other sources. The question arises; do institutions with online offerings believe they have good means of accessing the quality of their offerings?

To examine that question, academic leaders were asked if they agreed with the statement that "My institution has good tools in place to assess the quality of online instruction" as well as a similar question directed at in-person instruction. Roughly two-thirds of the academic leaders agreed they have good tools in place to assess instructional quality, with the single exception of leaders at institutions that offer only online courses and not fully online programs, where less than one-half agree they have good tools to assess their online instruction.

My Institution Has Good Tools in Place to Assess the Quality of...
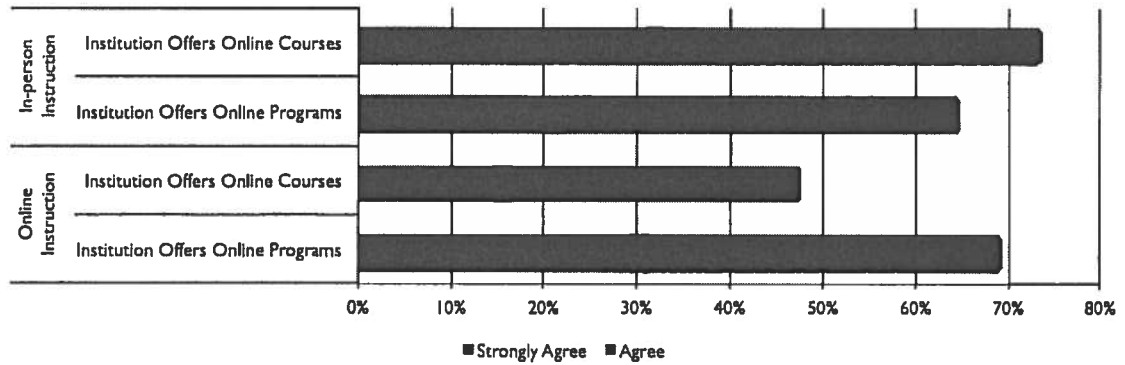
Chief academic officers are more positive about their institution's ability to assess instructional quality than are either academic technology administrators or teaching faculty. Compared to the results from a representative national survey of teaching faculty and academic technology administrators[5] shows academic leaders to be ten to twenty percent more likely to *agree* or *strongly agree* that their institution has good tools to assess in-person instruction. They are also more positive about their institutions tools to assess online instruction – where faculty members (especially those with no online teaching responsibilities) are far more pessimistic.

My Institution Has Good Tools in Place to Assess the Quality of...

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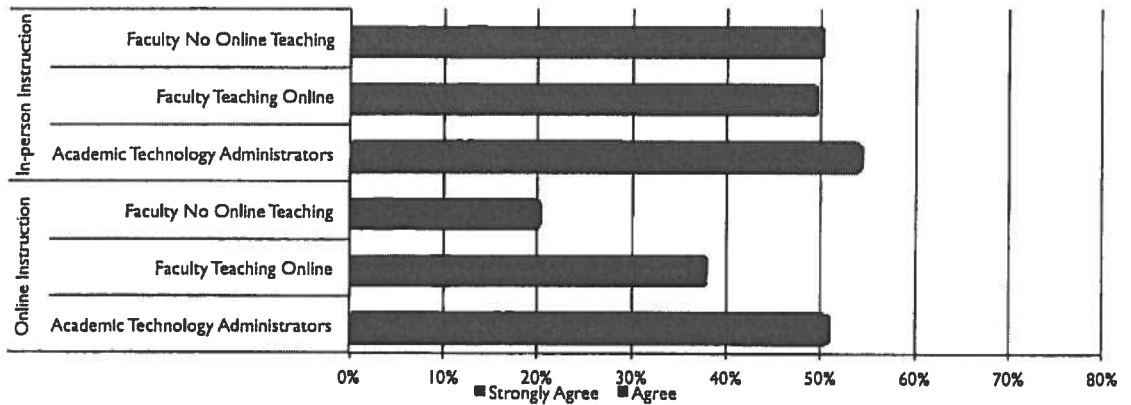
[5] Allen, I. Elaine, Jeff Seaman with Doug Lederman and Scott Jaschik, *Conflicted: Faculty and Online Education, 2012, Inside Higher Ed,* Babson Survey Research Group, 2012

Has Faculty Acceptance of Online Increased?

An important concern for those advocating online education has been the continued resistance among many faculty members. Results for 2012 show chief academic officers reported a slight decrease in faculty acceptance of online instruction compared to the results reported for 2011. Between 2002, when this question was first asked, and 2007 the proportion of institutions reporting their faculty accept the value and legitimacy of online education increased barely six percentage points. This was followed by a small drop in 2009, an increase in 2011, and the latest drop. The proportion of academic leaders that report their faculty accept the value and legitimacy of online education is once again at the same level it was for 2004.

Faculty at My School Accept the Value and Legitimacy of Online Education – Fall 2002 to Fall 2012

	Fall 2002	Fall 2004	Fall 2005	Fall 2006	Fall 2007	Fall 2009	Fall 2011	Fall 2012

The perceived acceptance rate by faculty varies widely between colleges and universities with online offerings and those without such offerings. Only about ten percent of chief academic officers at institutions with no online offering report their faculty accept the value and legitimacy of online education. About one-fifth (20.4% in 2011 and 18.6% in 2012) of academic leaders at institutions that offer online courses but not fully online programs report their faculty accept online education. Even among those institutions with full online programs less than a majority (43.9% in 2011 and 38.4% in 2012) of chief academic officers say their faculty fully accept online education. The perceived level of acceptance has decreased over the past year at all three types of institutions.

Faculty at My School Accept the Value and Legitimacy of Online Education – Fall 2011 and Fall 2012
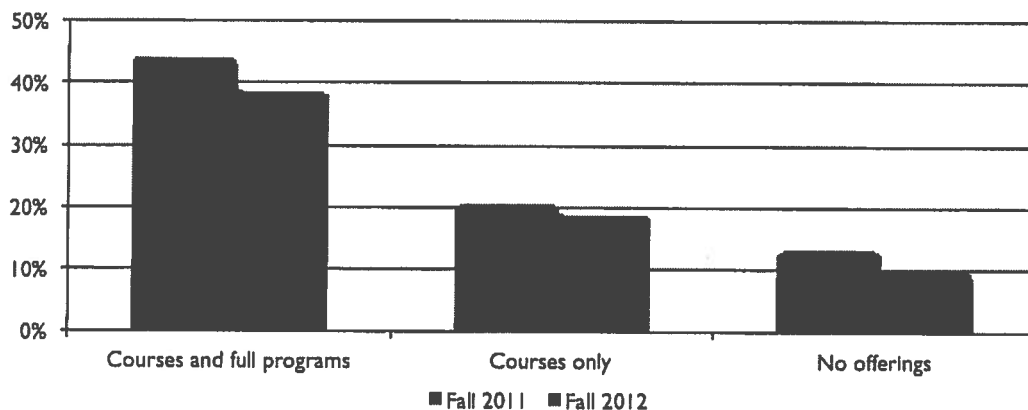
Not only do academic leaders have continuing concerns about the level of faculty acceptance of online, they also believe faculty acceptance is critical. When asked about the lack of acceptance of online instruction by faculty was an important barrier to the widespread adoption of online education, a large majority rated it as *Important* or *Very Important*. Fully one-quarter (25.6%) reported this was a *Very Important* barrier, while an additional 41.2 percent said it was *Important*.

Lack of Acceptance of Online Instruction by Faculty as a Barrier to to the Growth of Online Instruction - 2012

- Very Important
- Important
- Somewhat Important
- Not Important
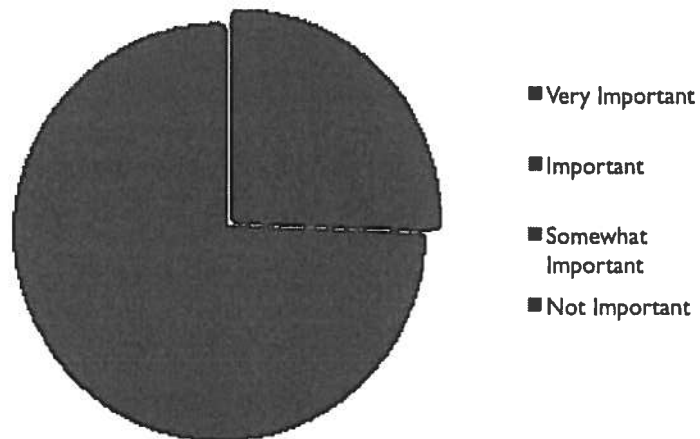
Between 2007 and 2012 the level of concern among chief academic officers that the lack of acceptance of online by faculty represents a barrier to the widespread adoption of online has seen a slight increase. The total reporting it as *Important* or *Very Important* grew from 61.1 percent in 2007 to 66.8 percent by 2012.

Lack of Acceptance of Online Instruction by Faculty as a Barrier to the Growth of Online Instruction - 2007 and 2012

■ Important ■ Very Important

28
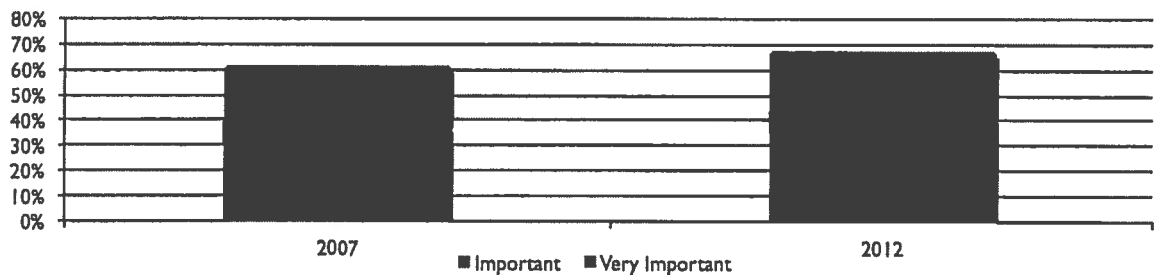
Barriers to Widespread Adoption of Online Learning

The online learning reports in this series track the opinions of chief academic officers, knowing they have the primary responsibility for the conduct and planning of each school's academic offerings. While these academic leaders are often very positive about online education, with increasing numbers reporting online is critical for their institutions' long-term strategy and steadily growing online enrolments, they do harbor a number of concerns. Concerns with the quality of the learning outcomes for online education and the additional faculty time and effort online requires are discussed elsewhere in this report.

One additional area of concern for academic leaders is their belief online learning may not be appropriate for all students. In 2007 just over 80 percent reported "Students need more discipline to succeed in online courses" as an *Important* or a *Very Important* barrier to the widespread adoption of online education. Experience with online education has only strengthened this view – the proportion of academic leaders who report "Students need more discipline to succeed in online courses" is an *Important* or a *Very Important* has increased to 88.8 percent for 2012.

The pattern of agreement has changed over time, with much larger numbers of public and private nonprofit institutions now agreeing online students need more discipline to succeed. Examining the proportion of academic leaders that cite this as a *Very Important* barrier shows increases of over 10 percentage points for both public (38.0% in 2007 to 50.8% in 2012) and private nonprofit (30.1% to 43.5%) institutions. Leaders of for-profit institutions were much stronger in their belief in 2007, and show a small drop in their level of concern for 2012 (54.6% to 49.7%). Their rates are now much more similar to their compatriots at the other types of institutions.

Students Need More Discipline to Succeed in Online Courses (% Very Important) 2007 and 2012
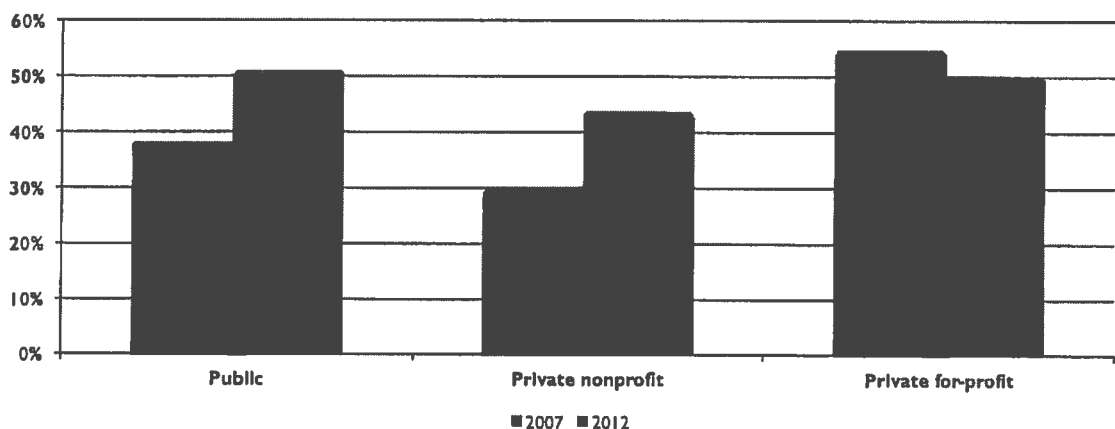
A continuing concern among academic leaders at all types of institutions has been their belief lower retention rates in online courses are a barrier to the growth of online instruction. This was noted as an *Important* or a *Very Important* barrier by over half (56.1%) of chief academic officers in 2007. This proportion increased by an additional five percentage points the next year (61.9% for 2008). The results for 2012 show another increase – nearly three-quarters (73.5%) now rate lower retention rates for online courses as an *Important* or a *Very Important* barrier.

Lower Retention Rates in Online Courses as a Barrierto the Growth of Online Instruction - 2007, 2008, and 2012
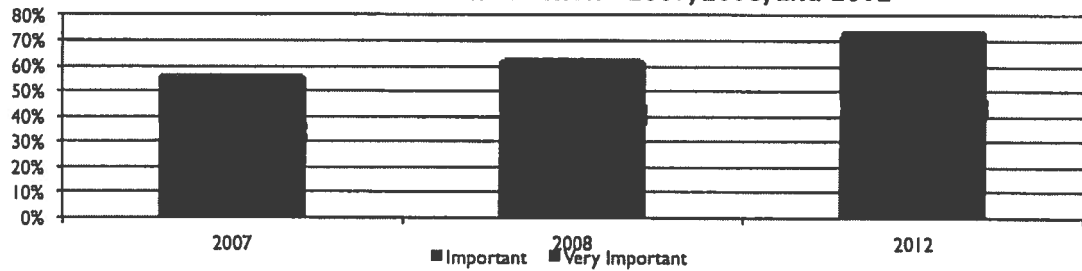
The increased level of concern with retention rates for online courses occurs across all types of institutions, with the greatest concerns coming among the for-profits. In 2008 just under three-quarters (74.9%) of for-profit institutions rated lower retention rates as an *Important* or a *Very Important* barrier. For 2012 it is now nearly ninety percent (89.7%). Public and nonprofit institutions have also registered increases in the proportion reporting retention rates as a barrier, but their numbers continue to be somewhat lower than those of the for-profits.

Lower Retention Rates in Online Courses as a Barrier to the Growth of Online Instruction - 2008 and 2012
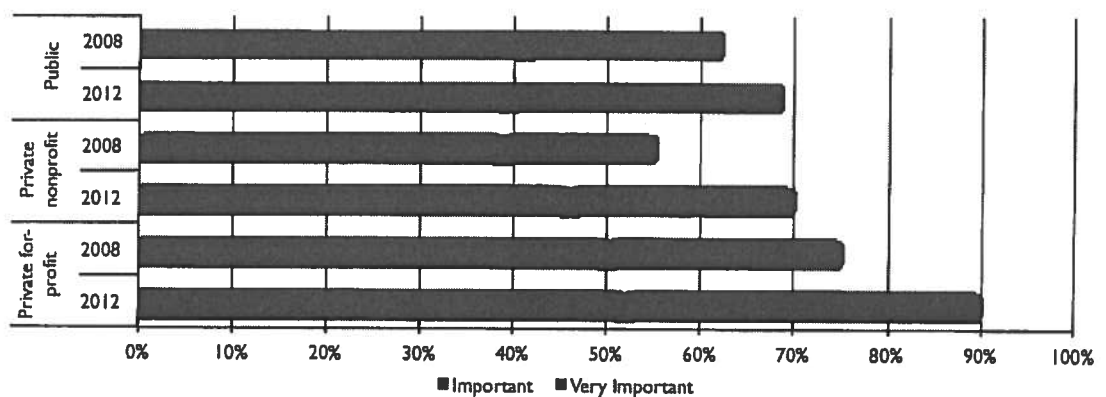
One potential barrier that has changed very little is the level of concern among chief academic leaders about the potential lack of acceptance of online education by potential employers. The proportion reporting this as an *Important* or a *Very Important* barrier has remained consistent over the years at around forty percent. There was a very small increase between 2007 and 2008, and with the 2012 results being almost exactly the same as those for 2008.

Lack of Acceptance of Online Education by Potential Employers as a Barrier to the Growth of Online Instruction - 2007, 2008, and 2012
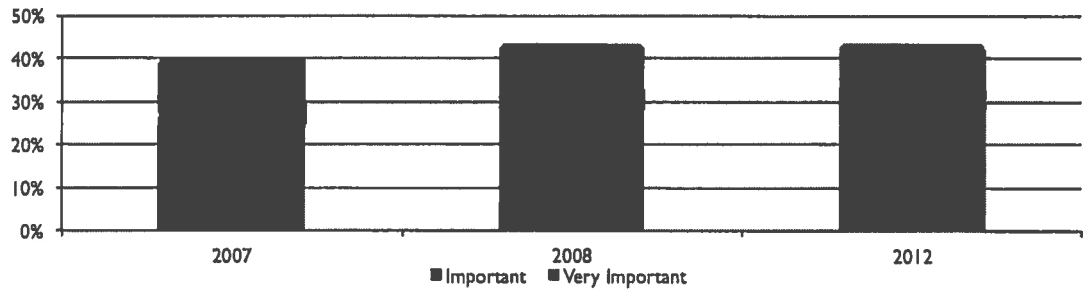
SURVEY METHODOLOGY

The sample for this analysis is comprised of all active, degree-granting institutions of higher education in the United States.

The data for this report is collected by both the Babson Survey Research Group and by the College Board[6]. The College Board includes questions for this study as part of its extensive data collection effort for its Annual Survey of Colleges. Babson Survey Research Group and the College Board coordinate survey instruments and sample outreach; each respondent institution receives identically worded questions, and those that have responded to one survey are not asked to respond to the same questions on the other.

All sample schools were sent an invitation email and reminders, inviting their participation and assuring them that no individual responses would be released. All survey respondents were promised they would be notified when the report was released and would receive a free copy.

The sample universe contains 4,527 institutions; a total of 2,820 responses were included in the analysis, representing 62.3 percent of the sample universe. Because non-responding institutions are predominately those with the smallest enrollments, the institutions included in the analysis represents 83.3 percent of higher education enrollments. The 2012 responses were merged with the data from the previous survey years (994 responses in 2003, 1,170 in 2004, 1,025 in 2005, 2,251 in 2006, 2,504 in 2007, 2,577 in 2008, 2,590 in 2009, 2,583 in 2010 and 2,512 in 2011) for examination of changes over time.

Institutional descriptive data come from the College Board Annual Survey of Colleges and from the National Center for Educational Statistics' IPEDS database. After the data were compiled and merged with the College Board Annual College Survey and IPEDS database, responders and nonresponders were compared to create weights, if necessary, to ensure that the survey results reflected the characteristics of the entire population of schools. The responses are compared for 35 unique categories based on the 2010 Carnegie Classification of Institutions of Higher Education. These weights provide a small adjustment to the results allowing for inferences to be made about the entire population of active, degree-granting institutions of higher education in the United States.

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[6] Portions of the data used for this report was collected by The College Board as part of the Annual Survey of Colleges and is Copyright © 2011-2012 The College Board.

TABLES

Massive Open Online Courses (MOOCs)

PLANS FOR MOOCS - 2012

Will Not be Adding a MOOC	32.7%
Not Yet Decided About a MOOC	55.4%
Planning to Add MOOC Offering(s)	9.4%
Have MOOC Offering(s)	2.6%

PLANS FOR MOOCS - 2012

	Specialized	Associates	Baccalaureate	Masters	Doctoral/ Research
Will Not be Adding a MOOC	39.5%	29.5%	38.8%	34.1%	16.7%
Not Yet Decided About a MOOC	49.2%	59.2%	54.7%	50.3%	52.1%
Planning to Add MOOC Offering(s)	6.8%	10.4%	4.3%	11.8%	21.4%
Have MOOC Offering(s)	4.5%	.9%	2.2%	3.7%	9.8%

PLANS FOR MOOCS - 2012

	Online Courses and Full Programs	Online Courses Only	No Online
Will Not be Adding a MOOC	25.6%	41.0%	47.5%
Not Yet Decided About a MOOC	58.7%	53.0%	45.6%
Planning to Add MOOC Offering(s)	13.2%	4.0%	3.2%
Have MOOC Offering(s)	2.6%	2.0%	3.6%

WORKING WITH OTHERS ON A MOOC - 2012

Planning to Add a MOOC	Currently Have a MOOC
50.2%	37.0%

MOOCS ARE A SUSTAINABLE METHOD FOR OFFERING COURSES

	Specialized	Associates	Baccalaureate	Masters	Doctoral/ Research
Agree	23.7%	29.2%	19.1%	29.0%	27.2%
Neutral	53.7%	46.9%	41.6%	40.7%	40.8%
Disagree	22.6%	24.0%	39.3%	30.4%	32.0%

MOOCs Are Important for Institutions to Learn About Online Pedagogy - 2012

	Specialized	Associates	Baccalaureate	Masters	Doctoral/ Research
Agree	48.8%	44.2%	49.2%	50.9%	60.6%
Neutral	34.8%	36.4%	28.8%	26.1%	24.5%
Disagree	16.5%	19.4%	22.0%	22.9%	14.9%

MOOCs Can be Used to Attract Potential Students - 2012

	Under 1500	1500 - 2999	3000 - 7499	7500 - 14999	15000+
Agree	35.6%	41.6%	57.7%	39.1%	59.6%
Neutral	41.2%	34.0%	24.9%	37.6%	23.1%
Disagree	23.2%	24.4%	17.4%	23.3%	17.2%

MOOCs are Good for Students to Determine if Online Instruction is Appropriate - 2012

	Under 1500	1500 - 2999	3000 - 7499	7500 - 14999	15000+
Agree	50.7%	52.5%	53.0%	44.1%	45.9%
Neutral	33.5%	31.9%	27.5%	27.1%	24.9%
Disagree	15.9%	15.5%	19.5%	28.8%	29.2%

MOOC Instruction Will Not be Accepted in the Workplace - 2012

Agree	18.6%
Neutral	45.4%
Disagree	36.0%

Percent Agreeing: Credentials for MOOC Completion Will Cause Confusion - 2012

	Specialized	Associates	Baccalaureate	Masters	Doctoral/ Research
Agree	51.0%	56.6%	62.4%	50.7%	60.9%

Are We Heading for Online 2.0?

CAMPUS RANK: ABILITY TO SCALE OUR ONLINE OFFERINGS - 2012

Above Average	14.3%
Somewhat Above Average	20.4%
Average	34.8%
Somewhat Below Average	22.6%
Below Average	7.8%

CAMPUS RANK: USING ONLINE TECHNOLOGY TO DEVELOP INNOVATIVE NEW COURSES - 2012

Above Average	9.9%
Somewhat Above Average	22.7%
Average	32.5%
Somewhat Below Average	27.8%
Below Average	7.1%

CAMPUS RANK: ABILITY TO SCALE OUR ONLINE OFFERINGS

	Under 1500	1500 - 2999	3000 - 7499	7500 - 14999	15000+
Above Average	14.3%	9.9%	10.5%	23.4%	19.3%
Somewhat Above Average	16.8%	20.4%	24.1%	23.6%	28.7%

CAMPUS RANK: USING ONLINE TECHNOLOGY TO DEVELOP INNOVATIVE NEW COURSES

	Under 1500	1500 - 2999	3000 - 7499	7500 - 14999	15000+
Above Average	9.4%	9.8%	5.2%	13.8%	17.4%
Somewhat Above Average	19.2%	24.1%	22.8%	30.3%	27.1%

CAMPUS RANK: ABILITY TO SCALE OUR ONLINE OFFERINGS

	Specialized	Associates	Baccalaureate	Masters	Doctoral/ Research
Above Average	12.0%	14.6%	16.9%	13.7%	16.3%
Somewhat Above Average	10.1%	27.5%	15.4%	18.4%	17.0%

CAMPUS RANK: USING ONLINE TECHNOLOGY TO DEVELOP INNOVATIVE NEW COURSES

	Specialized	Associates	Baccalaureate	Masters	Doctoral/ Research
Above Average	9.2%	10.5%	5.1%	12.6%	13.9%
Somewhat Above Average	19.7%	24.5%	26.9%	17.0%	32.5%

Is Online Learning Strategic?

**ONLINE EDUCATION IS CRITICAL TO THE LONG-TERM STRATEGY OF MY INSTITUTION –
FALL 2002 TO FALL 2012**

	Fall 2002	Fall 2003	Fall 2004	Fall 2005	Fall 2006
Agree	48.8%	53.5%	56.0%	58.4%	59.1%
Neutral	38.1%	33.7%	30.9%	27.4%	27.4%
Disagree	13.1%	12.9%	13.1%	14.2%	13.5%

	Fall 2007	Fall 2009	Fall 2010	Fall 2011	Fall 2012
Agree	58.0%	59.2%	63.1%	65.5%	69.1%
Neutral	27.0%	25.9%	24.6%	21.0%	19.7%
Disagree	15.0%	14.9%	12.3%	13.5%	11.2%

**PERCENT AGREEING: ONLINE EDUCATION IS SIGNIFICANTLY REPRESENTED IN MY
INSTITUTION'S FORMAL STRATEGIC PLAN**

Online Courses and Full Programs	Online Courses Only
61.1%	30.4%

How Many Students are Learning Online?

**TOTAL AND ONLINE ENROLLMENT IN DEGREE-GRANTING POSTSECONDARY
INSTITUTIONS – FALL 2002 THROUGH FALL 2011**

	Total Enrollment	Annual Growth Rate Total Enrollment	Students Taking at Least One Online Course	Online Enrollment Increase over Previous Year	Annual Growth Rate Online Enrollment	Online Enrollment as a Percent of Total Enrollment
Fall 2002	16,611,710	NA	1,602,970	NA	NA	9.6%
Fall 2003	16,911,481	1.8%	1,971,397	368,427	23.0%	11.7%
Fall 2004	17,272,043	2.1%	2,329,783	358,386	18.2%	13.5%
Fall 2005	17,487,481	1.2%	3,180,050	850,267	36.5%	18.2%
Fall 2006	17,758,872	1.6%	3,488,381	308,331	9.7%	19.6%
Fall 2007	18,248,133	2.8%	3,938,111	449,730	12.9%	21.6%
Fall 2008	19,102,811	4.7%	4,606,353	668,242	16.9%	24.1%
Fall 2009	20,427,711	6.9%	5,579,022	972,669	21.1%	27.3%
Fall 2010	21,016,126	2.9%	6,142,280	563,258	10.1%	29.2%
Fall 2011	20,994,113	-0.1%	6,714,792	572,512	9.3%	32.0%

Who Offers Online?

TYPE OF ONLINE OFFERINGS - 2002

Online Courses and Full Programs	34.5%
Online Courses Only	37.2%
No offerings	28.3%

TYPE OF ONLINE OFFERINGS - 2012

Online Courses and Full Programs	62.4%
Online Courses Only	24.2%
No offerings	13.4%

TYPE OF ONLINE OFFERINGS - 2002 AND 2012

		Online Courses and Full Programs	*Online Courses Only*
Private for-profit	2012	72.9%	12.1%
	2002	48.9%	43.9%
Private nonprofit	2012	48.4%	30.3%
	2002	22.1%	32.4%
Public	2012	70.6%	24.5%
	2002	48.9%	43.9%

TYPE OF ONLINE OFFERINGS - 2002 AND 2012

		Online Courses and full programs	*Online Courses Only*
Under 1500	2002	17.0%	28.4%
	2012	51.6%	26.0%
1500 - 2999	2002	29.3%	49.9%
	2012	54.5%	33.7%
3000 - 7499	2002	46.0%	44.7%
	2012	75.9%	18.8%
7500 - 14999	2002	54.4%	42.0%
	2012	81.5%	16.8%
15000+	2002	72.4%	25.3%
	2012	82.8%	16.3%

Does it Take More Faculty Time and Effort to Teach Online?

IT TAKES MORE FACULTY TIME AND EFFORT TO TEACH AN ONLINE COURSE THAN A FACE-TO-FACE COURSE - 2012

Agree	44.6%
Neutral	45.7%
Disagree	9.7%

PERCENT AGREEING IT TAKES MORE FACULTY TIME AND EFFORT TO TEACH AN ONLINE COURSE - 2006 AND 2012

	Private for-profit	Private nonprofit	Public
2006	31.6%	41.4%	44.8%
2012	24.2%	45.3%	55.2%

Are Learning Outcomes in Online Comparable to Face-to-Face?

LEARNING OUTCOMES IN ONLINE EDUCATION COMPARED TO FACE-TO-FACE: 2003 - 2011

	2003	2004	2006	2009	2010	2011	2012
Inferior	10.7%	10.1%	7.8%	9.5%	9.8%	9.7%	5.3%
Somewhat inferior	32.1%	28.4%	30.3%	23.0%	24.3%	22.7%	17.7%
Same	44.9%	50.6%	45.0%	53.0%	48.4%	51.1%	56.4%
Somewhat superior	11.7%	10.0%	15.1%	12.4%	14.2%	13.8%	16.8%
Superior	0.6%	1.0%	1.8%	2.1%	3.4%	2.7%	3.7%

PROPORTION REPORTING LEARNING OUTCOMES IN ONLINE EDUCATION AS INFERIOR COMPARED TO FACE-TO-FACE: 2012

	Online Courses and Full Programs	Online Courses Only	No Offerings
Somewhat inferior	10.7%	27.5%	34.1%
Inferior	.8%	2.5%	21.7%

MY INSTITUTION HAS GOOD TOOLS IN PLACE TO ASSESS THE QUALITY OF...

		Strongly Agree	Agree
Online Instruction	Online Programs	30.4%	38.4%
	Online Courses	15.6%	31.6%
In-person Instruction	Online Programs	21.2%	43.1%
	Online Courses	31.9%	41.4%

MY INSTITUTION HAS GOOD TOOLS IN PLACE TO ASSESS THE QUALITY OF..

		Strongly Agree	Agree
Online Instruction	Academic Technology Administrators	16.5%	34.0%
	Faculty Teach Online	9.8%	27.7%
	Faculty No Online Teaching	3.6%	16.3%
In-person Instruction	Academic Technology Administrators	12.3%	41.5%
	Faculty Teach Online	12.5%	36.6%
	Faculty No Online Teaching	13.6%	36.2%

Has Faculty Acceptance of Online Increased?

FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – FALL 2002 TO FALL 2012

	Fall 2002	Fall 2004	Fall 2005	Fall 2006
Agree	27.6%	30.4%	27.6%	32.9%
Neutral	65.1%	59.3%	57.8%	56.1%
Disagree	27.6%	10.3%	14.7%	11.0%

	Fall 2007	Fall 2009	Fall 2011	Fall 2012
Agree	33.5%	30.9%	32.0%	30.2%
Neutral	51.9%	51.8%	56.5%	57.2%
Disagree	14.6%	17.3%	11.4%	12.6%

FACULTY AT MY SCHOOL ACCEPT THE VALUE AND LEGITIMACY OF ONLINE EDUCATION – FALL 2011 AND FALL 2012

	Courses and full programs	Courses only	No offerings
Fall 2011	43.9%	20.4%	13.0%
Fall 2012	38.4%	18.6%	10.0%

LACK OF ACCEPTANCE OF ONLINE INSTRUCTION BY FACULTY AS A BARRIER TO THE GROWTH OF ONLINE INSTRUCTION - 2012

Very Important	25.6%
Important	41.2%
Somewhat Important	26.6%
Not Important	6.7%

LACK OF ACCEPTANCE OF ONLINE INSTRUCTION BY FACULTY AS A BARRIER TO THE GROWTH OF ONLINE INSTRUCTION - 2007 AND 2012

	Important	Very Important
2007	36.9%	24.2%
2012	41.2%	25.6%

Barriers to Widespread Adoption of Online Learning

STUDENTS NEED MORE DISCIPLINE TO SUCCEED IN ONLINE COURSES (% VERY IMPORTANT) 2007 AND 2012

	Public	Private nonprofit	Private for-profit
2007	38.0%	30.1%	54.6%
2012	50.8%	43.5%	49.7%

LOWER RETENTION RATES IN ONLINE COURSES AS A BARRIER TO THE GROWTH OF ONLINE INSTRUCTION - 2007, 2008, AND 2012

	Important	Very Important
2007	35.1%	21.0%
2008	42.1%	19.8%
2012	44.7%	28.8%

LOWER RETENTION RATES IN ONLINE COURSES AS A BARRIER TO THE GROWTH OF ONLINE INSTRUCTION - 2008 AND 2012

		Important	Very Important
Private for-profit	2012	52.0%	37.7%
	2008	50.1%	24.8%
Private nonprofit	2012	46.0%	23.8%
	2008	38.9%	16.1%
Public	2012	39.5%	29.0%
	2008	41.2%	20.8%

LACK OF ACCEPTANCE OF ONLINE EDUCATION BY POTENTIAL EMPLOYERS AS A BARRIER TO THE GROWTH OF ONLINE INSTRUCTION - 2007, 2008, AND 2012

	Important	Very Important
2007	27.8%	11.7%
2008	31.0%	11.8%
2012	31.3%	11.5%

BABSON SURVEY RESEARCH GROUP

The study design, survey administration, analysis and report production for this series of online learning reports are the responsibility of the Babson Survey Research Group.

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The Babson Survey Research Group conducts regional, national, and international research, including survey design, sampling methodology, data integrity, statistical analyses and reporting.

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The A·P·L·U-Sloan National Commission on Online Learning

- Online Learning as a Strategic Asset, Volume II: The Paradox of Faculty Voices: Views and Experiences with Online Learning
- Online Learning as a Strategic Asset: A Survey of APLU Presidents and Chancellors
- Online Learning as a Strategic Asset: A Survey of NAFEO Presidents and Chancellors
- Online Learning as a Strategic Asset: A Survey of AIHEC Tribal College and University