

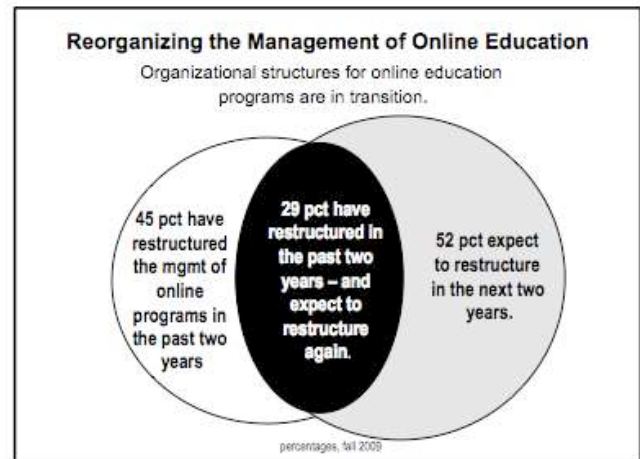
## Online Education Programs Marked by Rising Enrollments, Unsure Profits, Organizational Transitions, Higher Fees, and Tech Training for Faculty

Enrollments are up and rising, profits are often uncertain, and organizational arrangements are in transition according to a new national survey of senior campus officials responsible for managing online and distance education programs conducted by WCET—the Western Cooperative for Educational Telecommunications (wcet.info) and The Campus Computing Project (campuscomputing.net). Additionally, the new survey data suggest that students enrolled in online programs may pay higher fees than their on-campus counterparts, that many campuses have mandatory training for their faculty before sending them “into the web” to teach online courses, and that quality still looms as a large question for online education programs.

Three questions about enrollments indicate that campuses participating in the survey have experienced healthy gains in good economic times and bad – and that campus officials expect enrollments in their online programs to continue to rise in the coming years. Fully 94 percent of the survey respondents – typically the senior campus officer responsible for online or distance education programs – report enrollment gains in their online programs between 2006 and 2009; almost half (48 percent) report online enrollments rose by 15 percent or more during this period. Similarly, asked about past year numbers (fall 2008 vs. fall 2009), 95 percent report rising enrollment in their online programs; almost two-fifths (38 percent) report a one-year gain in online enrollments of 15 percent or better. Finally, when asked to project enrollments in their online programs over the next three years (2009-2011), 98 percent of the institutions participating in the survey affirm enrollment gains: almost half (47 percent) expect online enrollments grow by 15 percent or more over the next three years.

in the past two years and also expect another reorganization in the next 24 months.

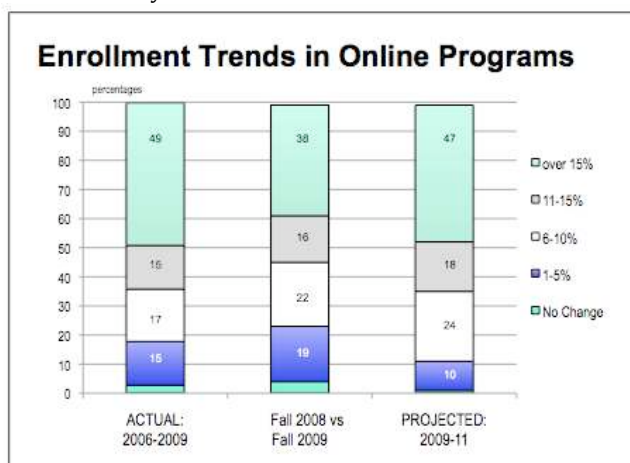
“The enrollment data, coupled with the new information about organizational transitions in online education programs, document the official ‘arrival’ of online education,” says Kenneth C. Green, founding director of The Campus Computing Project and director of the study. “These data confirm that campuses confront new operational and managerial challenges as online education moves from the periphery to become a much larger and more significant component of the instructional portfolio for many institutions.”



The survey data raise some interesting questions about the profitability of online education programs. Just 1.6 percent of the campuses participating in the survey report that their institution lost money on online programs and courses in the fiscal year that ended in June 2009: 7 percent report that the online program broke even, while 45 percent claim institutional profits on their online initiatives; more than a fourth – 27 percent – report profits were greater than 15 percent. These numbers appear to provide good news for campuses that view online and distance education as an important new source of enrollments and revenue. However, almost half (45 percent) of the campuses participating in the survey checked “unknown” when asked if their program made or lost money. The “unknown” responses ranged from 26 percent in private master’s institutions to 63 percent in community colleges.

“Although institutions know that the rising enrollments in their online programs are generating revenues, they just don’t know if these programs are really making money. Many campuses have a very hard time with the kind of cost accounting required to assess real profits from online education,” says Green.

The survey provides new data about the student costs of online education. A third (31 percent) of the campuses indicate that tuition is the same for online and on-campus students. Interestingly, a fifth (20 percent) report that tuition

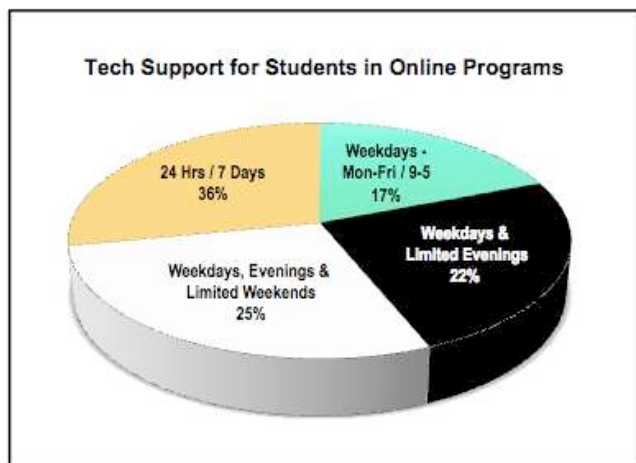


The survey data suggest that campuses across all sectors are struggling to deal with the organization of their online programs. Almost half (45 percent) report that they have reorganized the management of their online programs in the past two years, while more than half (52 percent) anticipate that their online education programs will be reorganized in the next two years. Additionally, almost a third (29 percent) have experienced the reorganization of their online programs

is lower for students in online programs. Yet at almost half the surveyed institutions, tuition for online students is often higher than for on-campus students: in some instances students in online programs may confront tuition charges that are 10 percent or more than the tuition paid by students in parallel on-campus programs.

In addition to the possibility of higher tuition, students in online programs may also incur additional fees not imposed upon their on-campus counterparts. For example, almost a fifth (19 percent) of campuses participating in the survey impose a one-time registration fee that averages \$232 (range: an average of \$51 in public master's colleges to \$1316 in private universities). Admittedly, these one-time fees may be limited to special programs, but they are charges not imposed on students in the on-campus program. Other fees that may await online students include special charges for individual courses (27 percent), course materials (18 percent), or technology resources and services (24 percent).

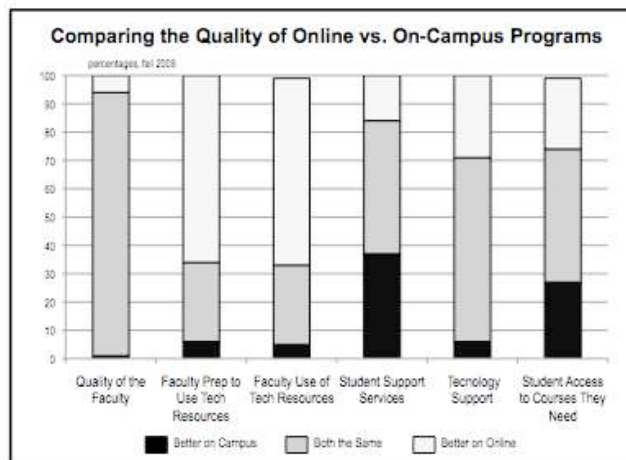
The survey data confirm that many campuses invest in preparing their faculty to teach in online programs. Fully half (53 percent) have mandatory training requirements for faculty who teach in online programs; the mandatory training averages about 27.5 hours.



Technical support is a major issue for students enrolled in online programs: the survey data suggest a range of campus strategies in providing technical support for students. For example, one-sixth (16 percent) of the campuses participating in the survey limit tech support to campus workdays (e.g., "Monday-Friday, 9-5"). A fifth (22 percent) provide tech support for students during campus workdays and during some limited evening hours, while a fourth (25 percent) offer support services on workdays with limited evening and weekend hours. Finally more than a third (35 percent of campuses in the survey) report "24/7" tech support services for students.

"Tech support really is a key component of the infrastructure for online programs. Done poorly, it has the potential to be the 'Potemkin Village' of online education," says Green. He cites a winter 2009 survey of community college presidents conducted by The Campus Computing Project and the League for Innovation that revealed two-year colleges were hiring part-time faculty to respond to the rising enrollments fueled by the economic downturn. But, says Green, "these same institutions were not hiring academic advisors, career counselors, or tech support personnel to assist the growing numbers of students. It's a hollow promise when campuses add courses without the concurrent commitment to provide appropriate instructional and tech support services for students and faculty."

Despite the reliance on the Internet and the Web, the survey data provide ample evidence that online courses depend heavily on traditional print materials. More than four-fifths (85 percent) of the survey respondents report that traditional textbooks are "widely used" in their institution's online education courses and programs. And although large numbers of campuses report the use of online text resources (74 percent) and asynchronous text-based discussion (76 percent) in distance education classes, other electronic and web-based technologies such as asynchronous video discussions, eBooks, online whiteboards, wikis, and web conferencing are not widely deployed in online courses and programs.




Quality looms as an important issue for online education. Almost all respondents affirm that faculty quality is comparable in their online and on-campus programs (93 percent), while four-fifths (79 percent) assert that the student learning experience is similar, student outcomes are the same (84 percent), as is employer acceptance of the credentials of students from online and on-campus programs (93 percent). Additionally, large numbers of the respondents report that tech support is about the same in the on-campus and online programs (65 percent), as are course completion rates (60 percent) and student retention/degree completion (54 percent). Yet there is not much evidence from this survey or other sources that campuses are engaged in a coordinated and systematic examination of their online programs: respondents at half (48 percent) of the campuses participating in the survey indicate that student assessment in online courses and programs resides primarily with faculty, while the primary responsibility for program evaluation resides within individual departments (49 percent of campuses).

The 2009 Managing Online Education Survey is a collaborative initiative of the Western Cooperative for Educational Telecommunications (WCET) and The Campus Computing Project. The survey data are based on responses from 182 senior campus officials at two- and four-year public and private US colleges and universities who were surveyed in September and October 2009. Survey respondents were typically the senior campus official responsible for the management of online and distance education programs at their institutions. The survey report will be available from The Campus Computing Project ([campuscomputing.net](http://campuscomputing.net)) on November 20<sup>th</sup>.

# MANAGING ONLINE EDUCATION PROGRAMS

Kenneth C. Green • The Campus Computing Project




**MANAGING ONLINE  
EDUCATION PROGRAMS**

**The 2009 WCET-Campus Computing Project Survey**

*2009 WCET Conference*  
*Denver • 21 October 2009*

**Kenneth C. Green**  
THE CAMPUS COMPUTING PROJECT



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The image is a black rectangular graphic with yellow and white text. At the top left is a small version of the WCET logo. The main title "MANAGING ONLINE EDUCATION PROGRAMS" is in large, bold, yellow capital letters. Below it, "The 2009 WCET-Campus Computing Project Survey" is in smaller yellow capital letters. Underneath that, "2009 WCET Conference" is in cyan italicized font, followed by "Denver • 21 October 2009" in smaller cyan italicized font. At the bottom left, the author's name "Kenneth C. Green" and "THE CAMPUS COMPUTING PROJECT" are in white. At the bottom right is a yellow square icon of a computer monitor with a graduation cap on top. At the bottom left, the copyright notice "© Kenneth C. Green, 2009" is in white.

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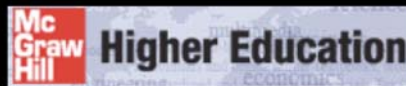
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## Acknowledge: Project Sponsors



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**RUSSELL POULIN**  
Interim Executive Director



**MEGAN E. RAYMOND**  
Events Coordinator



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## Project Goal: Bring Data!

“In God we trust;  
all others bring data.”



W. Edwards Deming

## Project Goal

- ◆ FOCUS: operational, instructional, and IT issues for online programs
- ◆ “Bring data” to the campus planning policy discussions about online/distance education

Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

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## What's Driving the Growth of Online Ed

- ◆ Economics
- ◆ Experience
- ◆ Infrastructure
- ◆ Evidence

Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

## Top Issues Confronting Online Ed Over the Next 2-3 Years

1. Responding to rising demand
2. Internal organizational challenges

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3. Instructional support for faculty
4. Institutional financial support for building the online program

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4. Improving student retention in courses & programs
6. Effective assessment
7. Keeping pace with emerging technologies
7. Intense competition for students

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9. User support for students
10. Earning a profit on our online ed programs
11. ADA Compliance
12. Union agreements that define faculty workloads

Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

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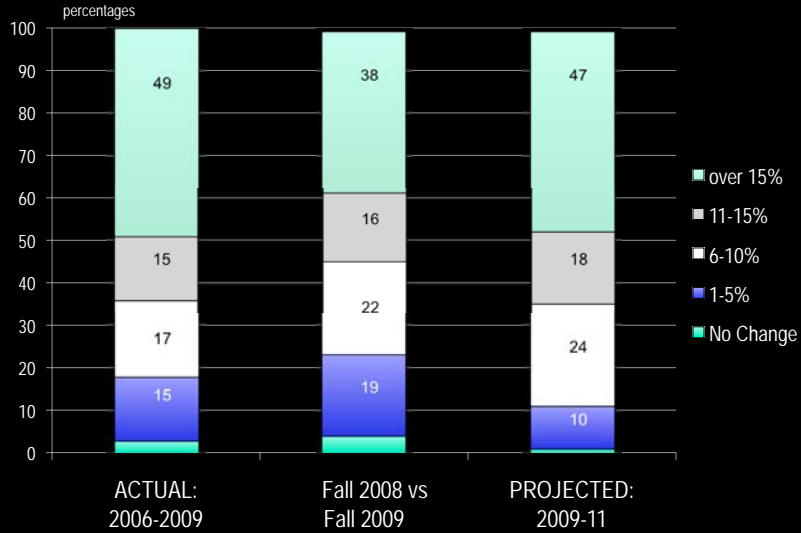
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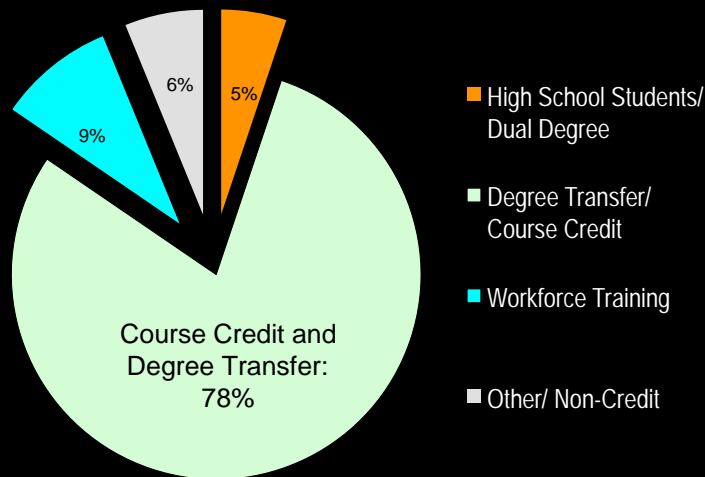
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## Enrollment Trends in Online Programs



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

## The Profile of Students Enrolled in Online Courses and Programs



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

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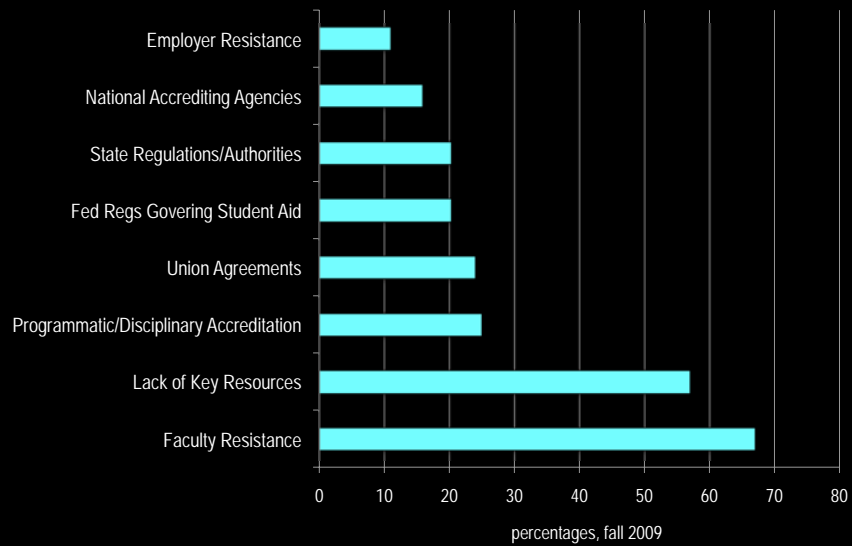
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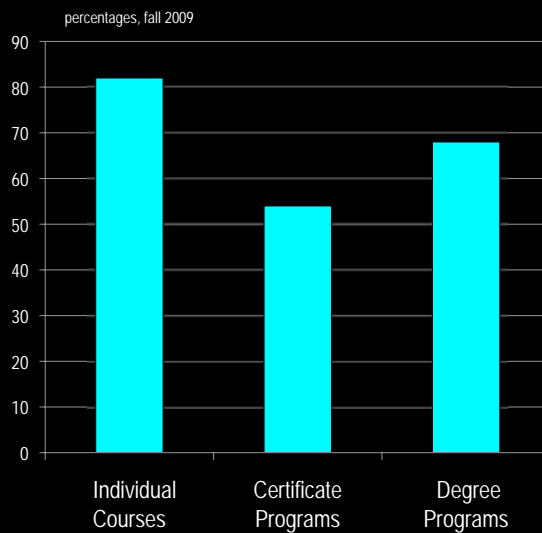
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## Institutional Efforts to Expand Online Education Impeded by:



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

## Online Courses & Programs Also Offered On-Campus



- Large overlap between online and on-campus courses and programs
- Online certificate programs less likely to be offered on-campus

Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

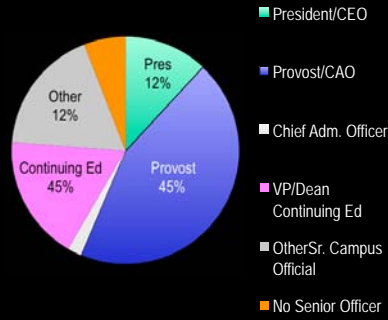


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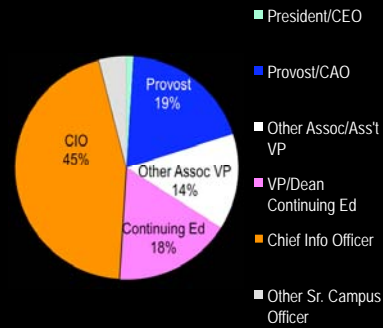
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## Who's the Boss?

Senior Officer for Online Ed Programs Reports to:



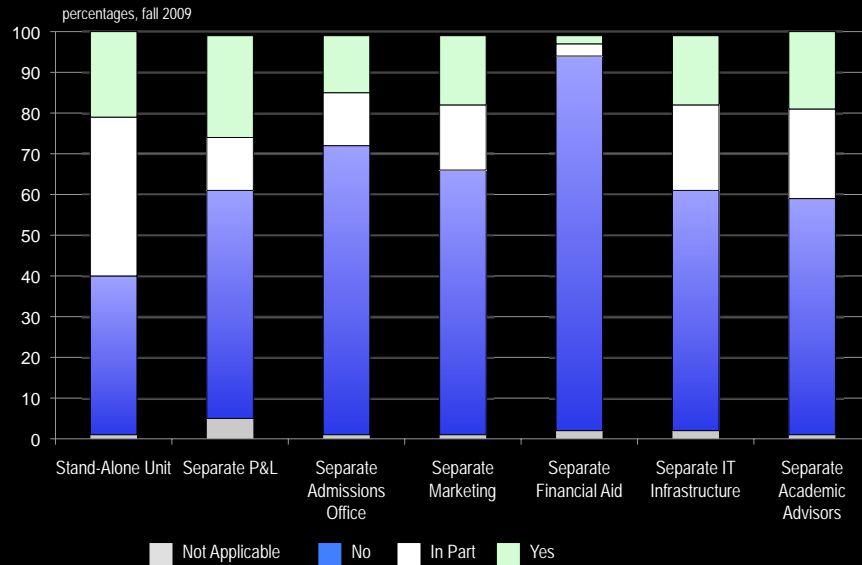
The Official Title of the Senior Operating Officer for the Online Program is:



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

### Organization Issues

## At My Institution the Online Learning Unit



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

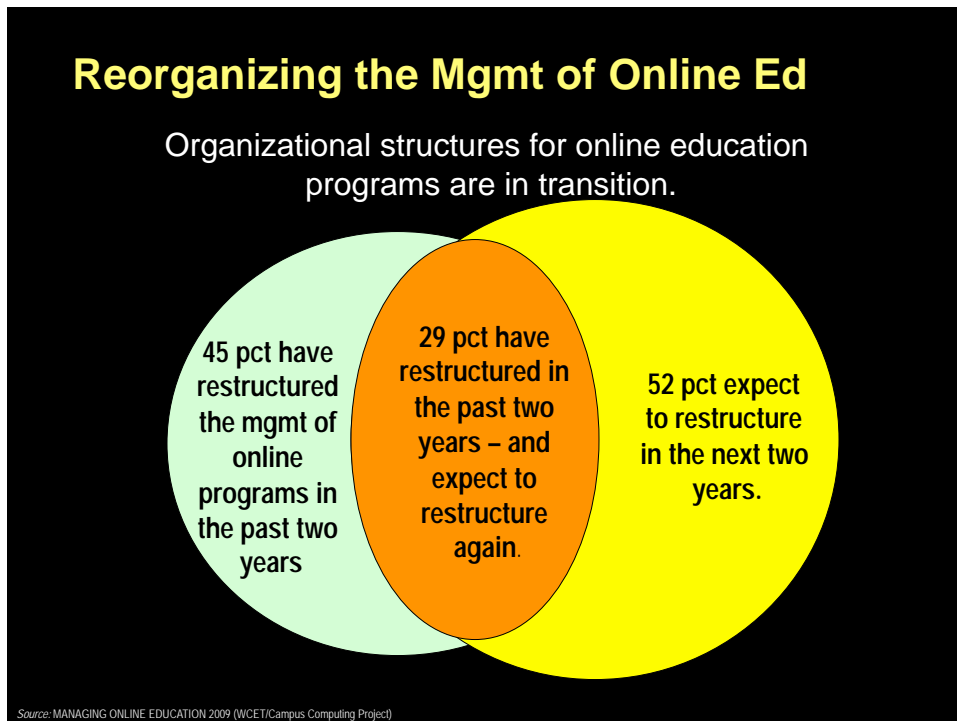
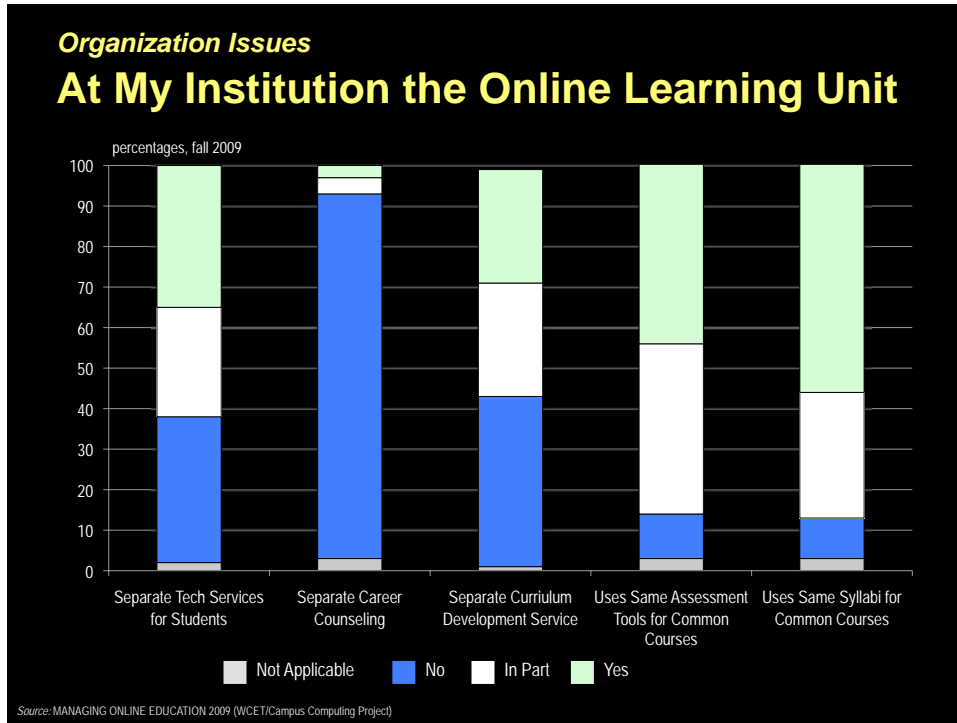
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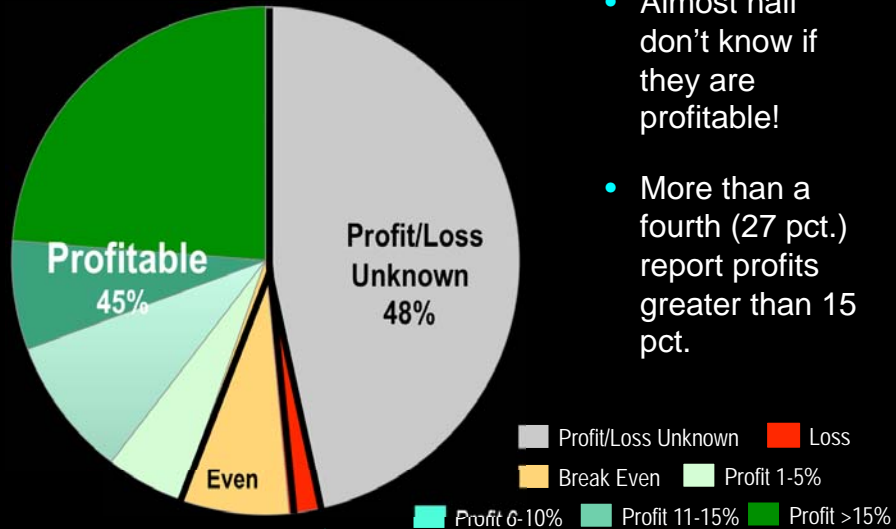


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## Do Online Programs Make Money?

Average ROR for A/Y 2009 (through June 09)

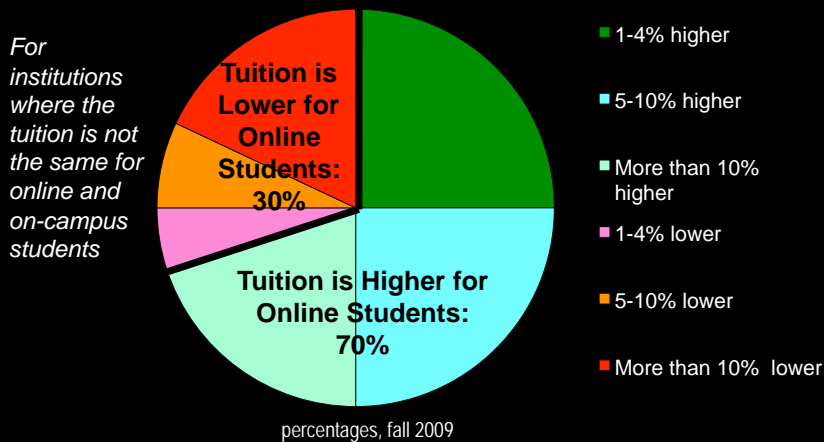


- Almost half don't know if they are profitable!
- More than a fourth (27 pct.) report profits greater than 15 pct.

Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

## Do Students In Online Programs Pay the Same Tuition as Students On-Campus?

- A third (32 pct) of survey respondents report that all students pay the same tuition, online or on-campus

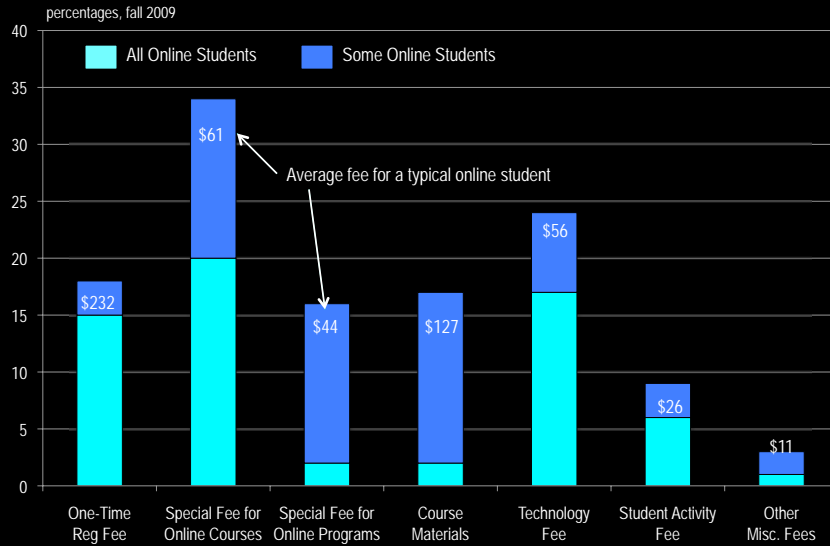


Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

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## Additional Fees for Students in Online Programs (not charged to on-campus students)



## Class Size in Online Courses

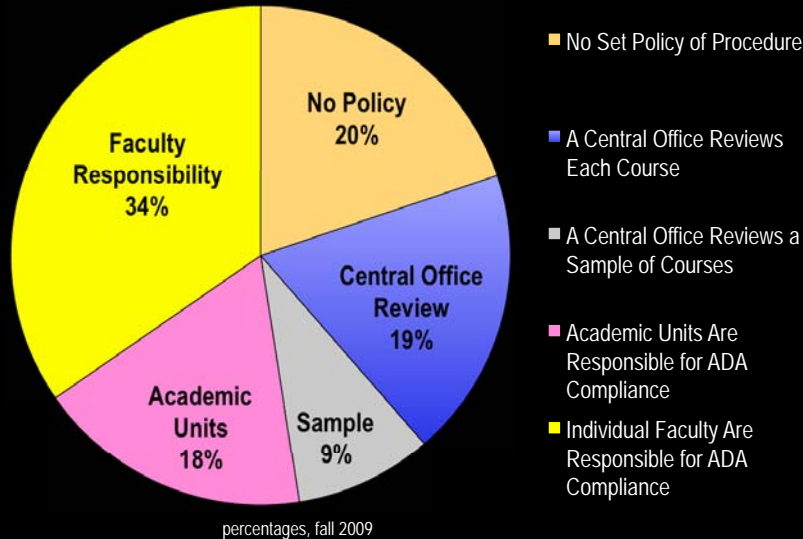
- More than three-fourths (77 pct) of institutions in the survey report that they limit the class size for online courses (range by sector: 63 to 90 pct)
- Among institutions that do limit class size for online courses, the enrollment cap averages 37 students/class or section. (range by sector: 18 to 84 students)

Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

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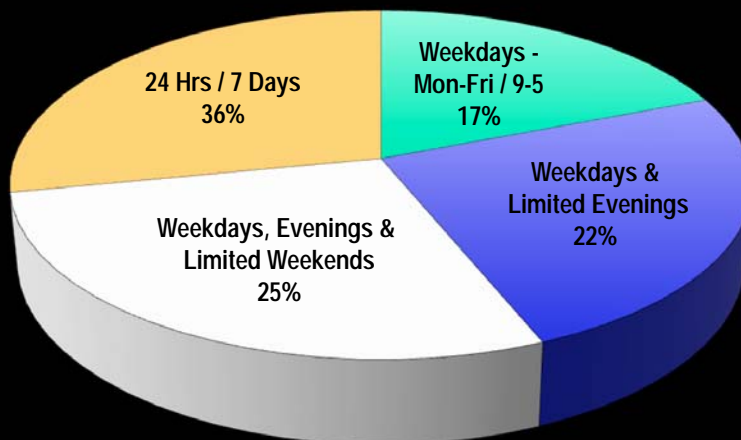
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## ADA Compliance in Online Programs



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

## Tech Support for Students in Online Programs

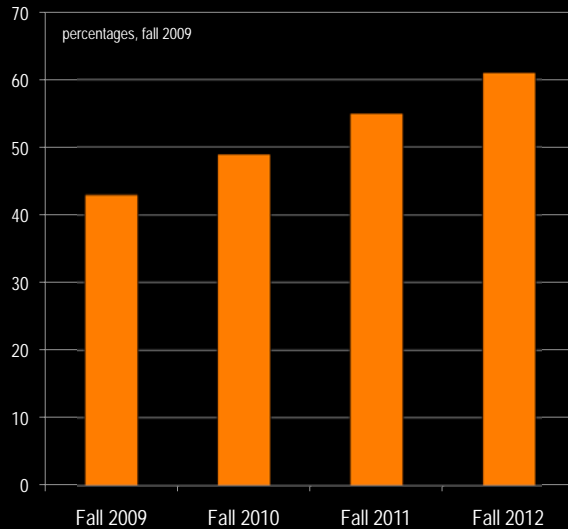


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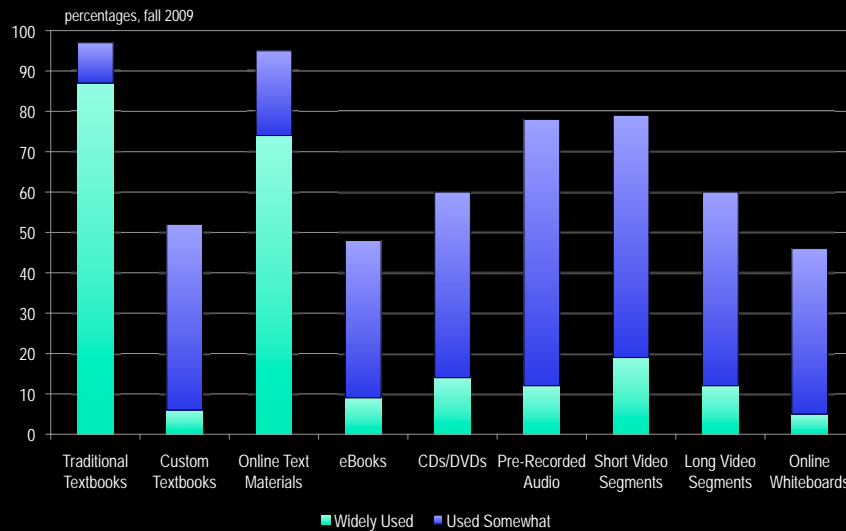
## Instructional Content in Electronic Format (textbooks, course assignments, etc.)



- Large variation by sectors
- Proportion of instructional content in digital format could grow by more than 25% by 2012

Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

## Instructional Media and Resources Used on Online Courses & Programs

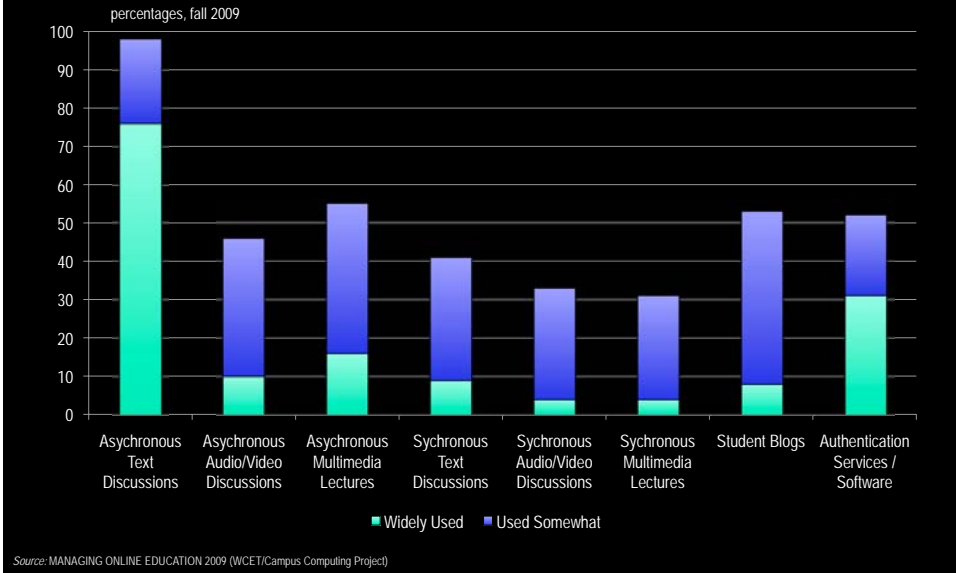


Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

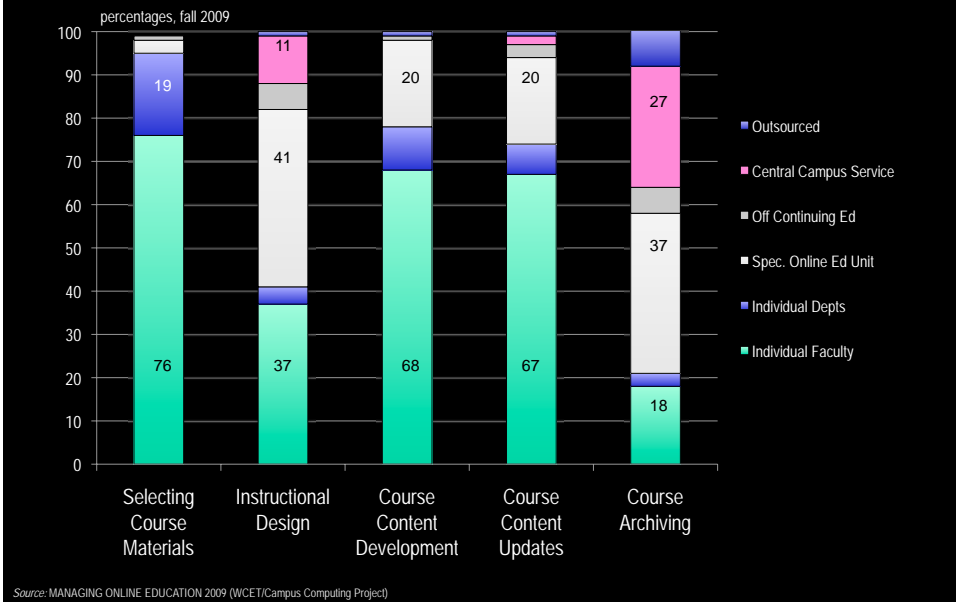
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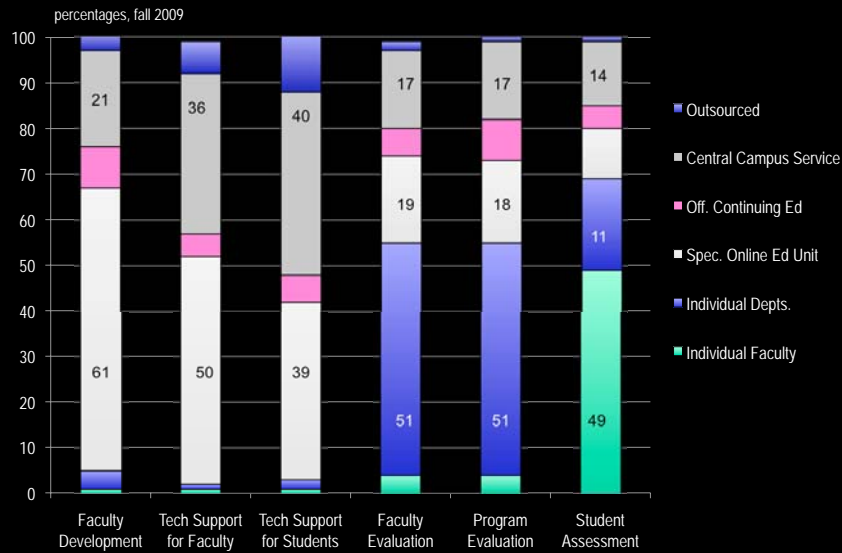
## Development and Support for Online Ed



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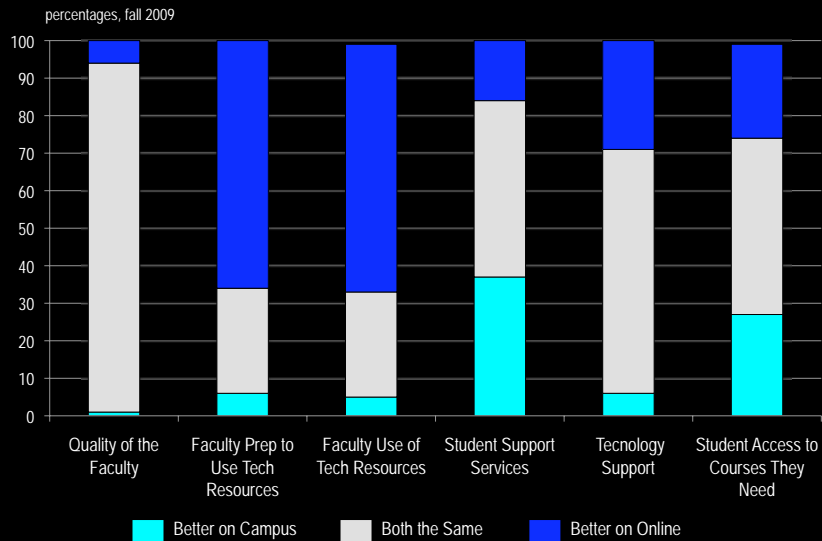
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## Development and Support for Online Ed



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

## Comparing the Quality of Online vs. On-Campus Programs



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

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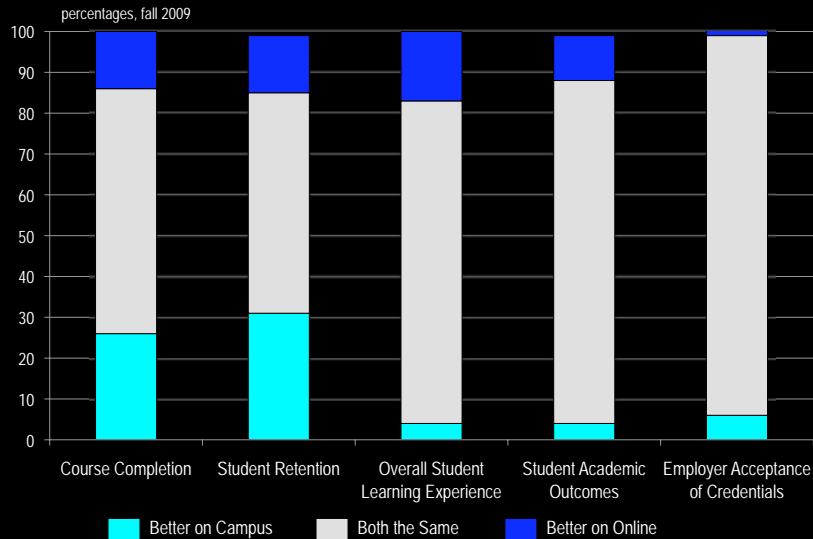




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## Comparing the Quality of Online vs. On-Campus Programs



## Mandatory Tech Training for Faculty in Online Programs?

- Over half (53 percent) of institutions in the survey report mandatory technology training for faculty teaching in online programs
- Average numbers of mandatory training: 27 hrs. (range: 17-55 hours)
- Average number of annual continuing education training hours for faculty in online programs: 2.5 hrs.

Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

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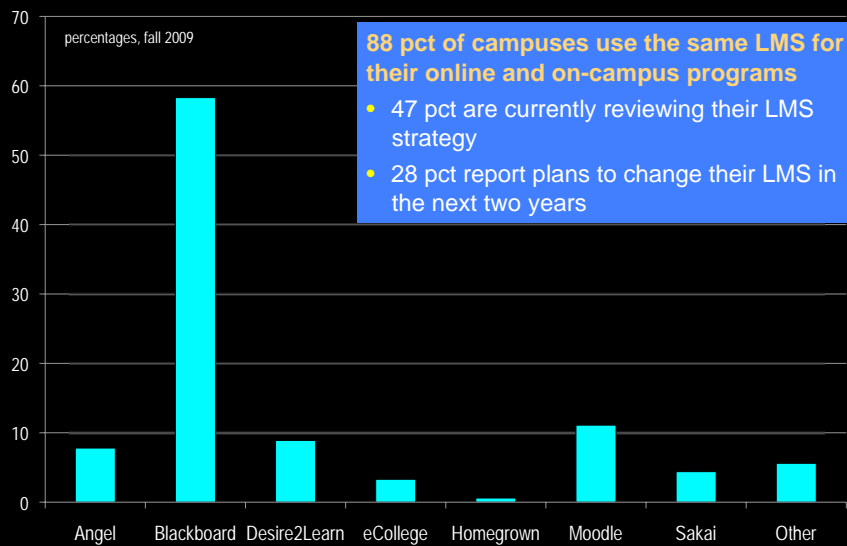
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## LMS Strategy

- Most campuses (88 pct.) report that they use the same LMS application for the online and on-campus programs
- Almost half report (47 pct) that they are currently reviewing the LMS strategy for the online program
- More than a fourth (28 pct) report plans to change the LMS in their online program with the next two years.

Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

## Primary LMS Application for the Online Program



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

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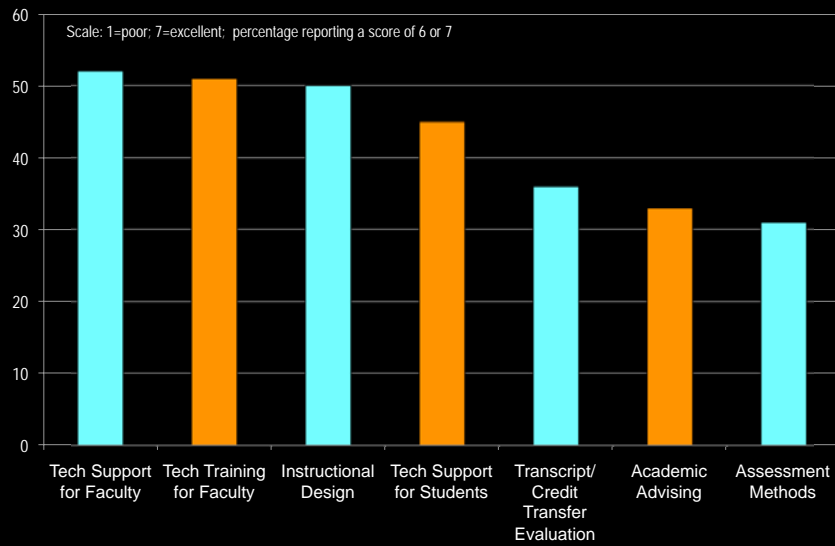
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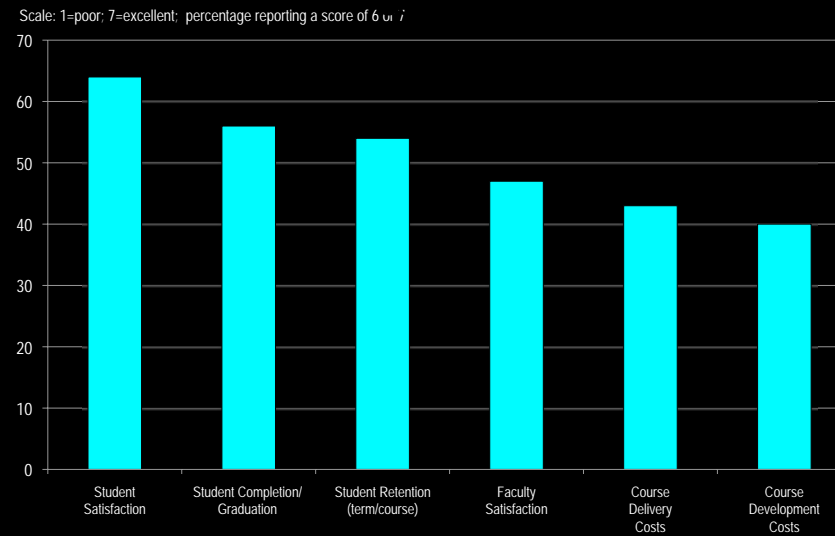
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## Rating the Resources and Services in Online Programs



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

## Key Performance Indicators for Online Educations Programs



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)

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## Summary / Key Issues

- Management and org. structures online ed in transition on many campuses
- Almost half the institutions appear unsure about the profitability of online ed
- Content delivery remains heavily text based; LMS key to online infrastructure
- Strong emphasis on initial tech training for faculty teaching in online programs
- Inconsistent assessment across online and on-campus programs



[www.campuscomputing.net](http://www.campuscomputing.net)