2010
DISTANCE EDUCATION SURVEY RESULTS

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

Instructional Technology Council

IN FOCUS:
THE YEAR IN REVIEW **2010**

Every year seems to be eventful for eLearning programs. In 2010, significant developments included:

1. The On-going Economic Downturn

   The recent economic recession has hit public and private higher education institutions hard during the past year. While stimulus funds issued through the American Recovery and Reinvestment Act of 2009 helped many state governments retain their employees and balance their books in 2009, many states were forced to reduce their financial support for public higher education when the program ended in 2010.

   Meanwhile, a bad economy prompted an increasing number of unemployed and underemployed workers to seek new job skills and career tracks at higher education institutions. As a result, community colleges, which rely heavily on local and state funding, were forced to do more with less. They saw an ever-increasing student demand for courses—particularly in the online environment which caters to working adults—as they experienced decreases in state and local funding. For many campuses, eLearning offered the most efficient, effective way to respond to increasing student enrollments.

   Public and private higher education institutions also experienced a decline in charitable giving. At the same time, student demand at expensive four-year private institutions decreased, as cash-strapped students enrolled in public four-and two-year colleges with lower tuition rates.

2. Relevant Regulatory and Legislative Activity

   - **State Authorization for Institutions Offering Distance Education to Out-of-State Students**

     "If an institution is offering postsecondary education through distance or correspondence education to students in a State in which it is not physically located, the institution must meet any State requirements for it to be legally offering postsecondary distance or correspondence education in that State. We are further providing that an institution must be able to document upon request by the Department that it has the applicable State approval."

     —Oct. 29, 2010 Amendments to the Higher Education Act Program Integrity Issues, State Authorization, Section §600.9.

     According to this federal regulation, which takes effect on July 1, 2014, in-state and out-of-state institutions that offer postsecondary education to a state's residents (face-to-face or online) must comply with applicable state approval and/or licensure requirements and be "authorized by name."

     Many states do not have the proper procedures in place to respond to all of the requests they are receiving as a result of this regulation. Colleges are also receiving contradictory and inadequate responses from state authorities.

     It will be time-consuming and expensive for most colleges to obtain state approval from every state in which an institution has out-of-state distance learning students who receive federally-funded financial

aid. Institutions will likely withhold educational opportunities to some out-of-state distance learning students to avoid dealing with these issues.

It is important to note that an institution's entire Title IV federally-funded student-financial aid program is not in jeopardy should the institution fail to receive state approval. However, the Department of Education can revoke an institution's ability to offer federally-funded financial aid to the out-of-state distance learning students in question, if the college does not produce the necessary documentation for those states.

If state authorization is not forthcoming, any Title IV student aid disbursed to out-of-state students is an institutional liability; the Department may request repayment and subject the institution to "further adverse actions regarding the institution's eligibility."

Before July 1, 2014, when this regulation comes into effect, institutions should take steps to:

1. Identify where their out-of-state students who are receiving federally-funded financial aid are located—to determine from which states they need to obtain authorization.
2. Decipher the regulations for each state in which they serve students.
3. Determine whether they need to apply for authorization from each state.
4. Apply in each state for which they are required (or make a "good faith effort" to do so).

See http://www.itcnetwork.org/resources/legislative-action.html for additional information.

- **Increased Scrutiny of For-Profit Higher Education Institutions**

In July 2010, the Obama Administration released its proposed regulations requiring for-profit career colleges to better prepare students for "gainful employment" or risk losing access to federal student aid. The proposed rules seek to protect students from taking on unsustainable debt they cannot repay and to protect taxpayers from high loan default rates.

Secretary of Education Arne Duncan said, "While career colleges play a vital role in training our workforce to be globally competitive, some of them are saddling students with debt they cannot afford in exchange for degrees and certificates they cannot use. These schools—and their investors—benefit from billions of dollars in subsidies from taxpayers, and in return, taxpayers have a right to know that these programs are providing solid preparation for a job. The rules we've proposed today will help ensure that career college and training programs use federal student aid to prepare students for success."

To qualify for federal aid, the law requires that career colleges and training programs prepare students for gainful employment in recognized occupations. The Department will define whether a program successfully prepares students for gainful employment using a two-part test: measuring the relationship between the debt students incur and their incomes after program completion; and measuring the rate at which all enrollees, regardless of completion, repay their loans on time. If a program graduated a large share of students with excessive debt-to-earnings ratios, it would be required to clearly disclose debt burdens to current and prospective students. The program could also become ineligible to participate in federal student aid programs.

See http://www.ed.gov/news/press-releases/proposed-rule-links-federal-student-aid-loan-repayment-rates-and-debt-earnings for additional information.

- **Broadband Technology Opportunities Program (BTOP)**

  The American Recovery and Reinvestment Act of 2009 provided the National Telecommunications and Information Administration (NTIA) and the U.S. Department of Agriculture's Rural Utilities Service with $7.2 billion to expand access to broadband services in the United States. The goals of the program were to increase broadband access and adoption; provide broadband training and support to schools, colleges, libraries, healthcare providers, and other organizations; improve broadband access to public safety agencies; and stimulate demand for broadband. In 2009 and 2010, following a rigorous application and review process, NTIA invested approximately $4 billion in 233 BTOP projects benefitting every state, territory, and the District of Columbia.

  This BTOP portfolio of projects included:

  - One-hundred and twenty-three infrastructure projects, totaling $3.5 billion in federal grant funds, to construct broadband networks;

  - Sixty-six public computer center (PCC) projects, totaling $201 million in federal grant funds, to provide broadband access, computer equipment, computer training, job training, and educational resources to the public and to specific vulnerable populations; and

  - Forty-four sustainable broadband adoption (SBA) projects, totaling $250.7 million in federal grant funds, to support innovative projects that promote broadband adoption, especially among vulnerable population groups where broadband technology has been traditionally underutilized.

  See http://www2.ntia.doc.gov/ for additional information.

  The Federal Communication Commission's National Broadband Plan has a similar commitment to providing broadband connections to schools and colleges in order to enhance opportunities for online learning. See http://www.broadband.gov/plan/11-education/#s11-1 for additional information about this program.

- **Failure to Enact the American Graduation Initiative**

  On July 14, 2009, President Barack Obama announced the American Graduation Initiative, a landmark proposal in which the president called for an additional five million community college degrees and certificates to be awarded by 2020. He also unveiled new steps, which the government would have provided $12 billion of funding for over the next decade, to ensure that those credentials would help graduates get ahead in their careers.

  The proposed program included a new "online skills laboratory"—to be funded at $50 million each year for ten years—that would have developed new open online courses "to create new routes for students to gain knowledge, skills and credentials. The courses would be developed by teams of experts in content knowledge, pedagogy, and technology and made available for modification, adaptation and sharing. The Departments of Defense, Education, and Labor would work together to make the courses freely available through one or more community colleges and the Defense Department's distributed learning network, explore ways to award academic credit based upon achievement rather than class hours, and rigorously evaluate the results."

  See http://www.whitehouse.gov/blog/Investing-in-Education-The-American-Graduation-Initiative/ for more information about the American Graduation Initiative.

Although online educators were disappointed with Congress's failure to pass this legislation, several of the initiative's goals were incorporated into the Department of Labor's TAA Community College and Career Training Grants program, albeit at a lower funding level.

- **Passage of the TAA Community College and Career Training Grants Program**

  The U.S. Department of Labor solicited grant applications for the Trade Adjustment Assistance (TAA) Community College and Career Training program through April 2011. They wish to award $500 million each year for the next four years—to ensure community colleges "can help workers acquire the skills, degrees, and credentials needed for high-wage, high-skill employment while also meeting the needs of employers for skilled workers."

  Creating accessible online learning strategies is a focus of the program: "With the creation of new online, open-source courses that can ultimately be shared and distributed nationwide, community colleges and other eligible institutions across the country can offer more classes without building more classrooms. New online courses can create new routes for workers and other students to gain knowledge, skills and credentials, and earn academic credit based upon achievement rather than class hours, all while providing continuous feedback to students and instructors."

  See http://www.doleta.gov/grants/pdf/SGA-DFA-PY-10-03.pdf for additional information on the TAA Community College and Career Training Grants Program.

- **The Department of Education's National Education Technology Plan**

  With the release of its National Education Technology Plan, "Transforming American Education: Learning Powered by Technology," in November 2010, the Department of Education recognized the importance of technology in education and the valuable role online instruction will play in preparing students for the rapidly changing needs of the 21st century economy and society.

  The plan notes that "As online learning becomes an increasingly important part of our education system, we need to provide online and blended learning experiences that are more participatory and personalized and that embody best practices for engaging all students. This creates both the need and opportunity for educators who are skilled in instructional design and knowledgeable about emerging technologies. Crucial to filling this need while ensuring effective teaching are appropriate standards for online courses and teaching and a new way of approaching online teacher certification."

  See http://www.ed.gov/technology/netp-2010 for additional information.

- **The 2008 Higher Education Opportunities Act (HEOA)**

  When it passed the HEOA in August 2008, Congress required institutions offering distance education and correspondence education to "have processes in place through which the institution establishes that the student who registers in a distance education or correspondence education course or program is the same student who participates in and completes the course or program and receives the academic credit."

  In its rulemaking proceeding, the Department of Education clarified that accrediting bodies only need to require "institutions to verify the identity of a student who participates in class or coursework by using, at the option of the institution, methods such as—a secure login and pass code, proctored examinations, and new or other technologies and practices that are effective—in verifying student

identification." This allows institutions to continue using the process they typically use to authenticate their online students within their course management system—a login and password—rather than impose a more rigorous or costly method.

See http://www2.ed.gov/policy/highered/leg/hea08/index.html for additional information.

ITC SURVEY HISTORY

The Instructional Technology Council (ITC) created its annual distance education survey in the fall of 2004 to respond to the growing need for national data related to distance learning program creation and development and for key issues affecting faculty and students. In the past, distance education practitioners have used data from the U.S. Department of Education and the annual series of reports by Sloan-C, but the landscape lacked a reliable source of longitudinal data gathered on a regular basis. Core survey questions have remained unchanged; however, the authors added additional questions pertaining to the use of assisted, hybrid and live interactive video courses in 2008.

The ITC board of directors conducted its first survey in the spring of 2005. Since many institutions do not gather or report information in the same way, some respondents had difficulty answering certain key questions. The board refined the questions and reissued the survey in the fall of 2005. Since then, ITC has conducted the survey in late fall, with respondents reporting data from the previous academic year. In the fall of 2006, ITC distributed the survey to members of the American Association of Community Colleges (AACC).

HOW THE SURVEY WAS CONDUCTED

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

ITC e-mailed the survey to its member representatives (usually the director of the distance learning program) at 345 member institutions and mailed it to the 1,200 members of the American Association of Community Colleges. Duplicates were eliminated. ITC received 139 completed and 189 incomplete responses. The completed surveys were reviewed to ensure a representative sample of ITC- and AACC-member institutions and confirm an acceptable response rate (139 out of 1,200) with an acceptable distribution of size and location among participitating institutions. For all percentages included in this report, "no answer" responses are not listed—consequently, data will not always equal 100 percent.

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

DISTRIBUTION OF RESULTS

- Fred Lokken, the survey's author, past chair of ITC, and associate dean of the TMCC WebCollege at Truckee Meadows Community College, presented the preliminary results at ITC's annual eLearning conference in St. Pete Beach, Florida on Feb. 19, 2011.
- Fred Lokken presented highlights from the survey findings at ITC's sponsored forum at the annual convention of the American Association of Community Colleges (AACC) in New Orleans, Louisiana on April 10, 2011.
- ITC will mail a printed version of the survey results to all ITC members and to the community college presidents of all AACC-member institutions.
- ITC will post an electronic summary of the survey results on its Web site www.itcnetwork.org.

2010 SURVEY RESULTS

GENERAL INFORMATION

Institutions Surveyed. More than 95 percent of respondents identified themselves as an associate's college (83 percent) or an associate's dominant college (12 percent). (See http://classifications.carnegiefoundation.org/descriptions/ugrad_program.php for more details about this classification.)

Distance Education Enrollment Growth. Respondents were asked to report comparative enrollment trends in distance education from fall 2009 to fall 2010 (the most recent full year of available data). Campuses reported a nine percent increase in distance education enrollments—which is higher than the seven percent increase in overall student enrollment at all higher education institutions, and the eight percent increase at community colleges, according to the National Center for Education Statistics, "Enrollment in Postsecondary Institutions, Fall 2009" (this report is available at http://nces.ed.gov/pubs2011/2011230.pdf).

As a point of comparison, the Sloan Consortium reported a 21 percent growth in distance learning enrollments, when comparing the number of students who took at least one online course during the fall 2009 term to the number of students who participated in an online course during the previous year. This report notes:

"The twenty-one percent growth rate for online enrollments far exceeds the less than two percent growth of the overall higher education student population. Nearly thirty percent of higher education students now take at least one course online." (The full report, "Class Differences: Online Education in the United States, 2010," is available at http://sloanconsortium.org/publications/survey/class_differences).

There are two key differences between the Sloan report and the ITC Survey—the reports review different academic years. The Sloan report reviews 2008-09 and the ITC Survey examines 2009-10, and the Sloan survey includes public, private and for-profit, as well as two- and four-year institutions. The ITC Survey looks primarily at public community colleges.

The ITC Survey asked respondents to identify factors which contributed to the increased eLearning enrollments:

- Downturn in the economy ***37 percent***
- Typical growth for distance education classes ***39 percent***
- New enrollment initiative ***12 percent***
- Don't know ***5 percent***
- Other ***7 percent***

Direct Report Line. In 2010, more than 70 percent of respondents indicated they reported to the vice president of academic affairs or to an academic dean. This figure remains consistent with last year's results and affirms the solid trend toward distance learning administrators reporting to the academic side of the institution, rather than to the instructional technology (IT) department. More than 6 percent of respondents indicated that they reported directly to their organization's president (up from four percent in 2008), and 1.56 percent indicated they report to a library administrator (down from 3.1 percent in 2008).

Non-credit Offerings. Seventy-three percent of campuses reported they offer noncredit online classes—this is a nine percent increase over the percentage reported last year. The increase may reflect the worsening national economy and the use of noncredit offerings to meet specific skill-training needs. Normally, noncredit online classes are offered as a component of community education or business outreach divisions.

Challenges for Administrators

"Our 'centralized' distance education administrative offices are located on a satellite campus which creates a communications breakdown when it comes to the flow of information from the main campus to our office."

—2010 ITC Survey Respondent

ADMINISTRATIVE QUESTIONS

Challenges. The ITC Survey asks respondents to rank the challenges their distance education program faces. For six years, the number one challenge has remained the need for support staff for training and technical assistance. In 2009, ITC added two new challenges—adequate assessment of distance education classes and compliance with the student authentication requirements in the HEOA. Offering adequate assessment has emerged as a significant challenge.

CHART 1: Greatest Challenges for Distance Education Programs Administrators

Chart 1 displays the range for responses to distance education administration challenges—1 represents the greatest challenge, while 10 is the least challenging.

Challenge	Rank 2010	Rank 2009	Rank 2008	Rank 2007	Rank 2006	Rank 2005	Rank 2004
Support staff needed for training and technical assistance	1	1	1	1	1	1	1
Adequate assessment of distance education classes	2	3					
Adequate student services for distance education students	3	2	2	2	3	5	2
Operating and equipment budgets	4	4	3	3	2	2	3
Adequate administrative authority	5	5	4	5	4	4	5
Adequate space for training and technical assistance	6	7	6	6	6	7	7
Faculty acceptance	7	6	5	4	5	3	4
Organizational acceptance	8	8	7	7	7	6	6
Compliance with HEOA student authentication requirements	9	9					
Student acceptance	10	10	8	8	8	8	8

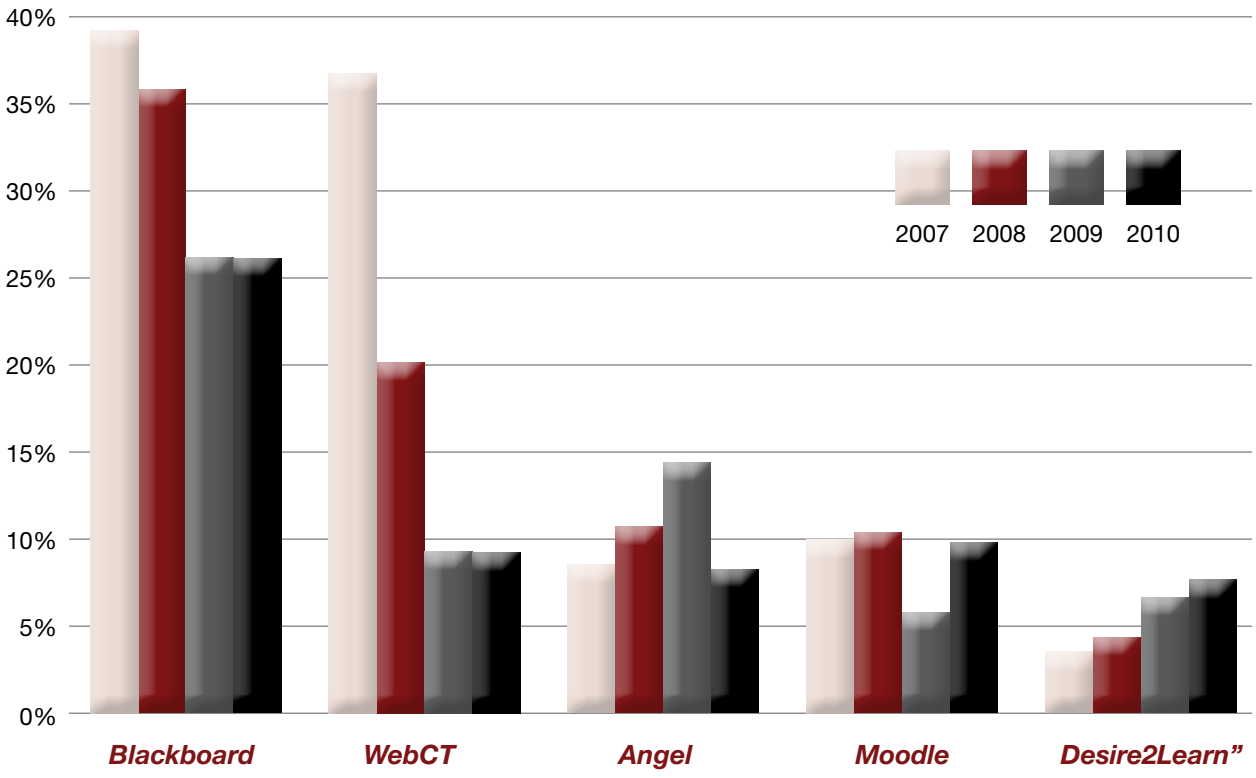
"The inability to have the authority to manage the program remains my primary frustration. Decisions are made affecting offerings without my knowledge and decisions are being made without an adequate understanding of the situation. I think all distance education administrators eventually 'hit the wall' since their organizations continue to refuse to adapt to the new reality."

—2010 ITC Survey Respondent

Learning Management System Usage. In 2009, 51 percent of the ITC Survey's respondents indicated they use Blackboard/WebCt/Angel Learning (27.4 percent use Blackboard, 9.7 percent use WebCT and 13.7 percent Angel Learning) for their learning management system (LMS).[1] In 2010, results indicated a drop of six percentage points for the Blackboard/WebCT/Angel Learning share of the LMS market—down from 56 percent of Blackboard/WebCT users reported in 2008.

Thirty-eight percent of respondents indicated they were considering switching their LMS platform in the next few years. This "one-third" share has been consistent for the past five years of the survey. Sixty-two percent of respondents reported they do not plan to switch their LMS. Sixty-four percent of respondents indicated they restrict the number of LMS platforms their campus will support—this is a drop of 15 percent from just last year, when 77 percent reported they restrict the number of LMS platforms their campus will support. Table 1 provides the response pattern over the past four years.

TABLE 1: LMS Usage



Challenges for Administrators

"We need one central faculty development center for supporting faculty in effective instructional design, the use of Blackboard and other educational technologies, assessment of the quality of their online courses, help with improving online course quality and help with rapidly changing technologies. We also need more staff in the system distance education area."

—Comments from the 2009 Survey

[1] Blackboard purchased Angel Learning on May 6, 2009 and Web CT in February 2006.

Accessibility Compliance. The ITC Survey has tracked a steady decline in administrator confidence over the accessibility of their online courses (Section 504 and Section 508 compliance) during the past three years in which ITC has included a question about the accessibility of online course materials.

	Completely compliant or mostly compliant	Somewhat compliant
2010	43%	28%
2009	54%	21%
2008	73%	26%

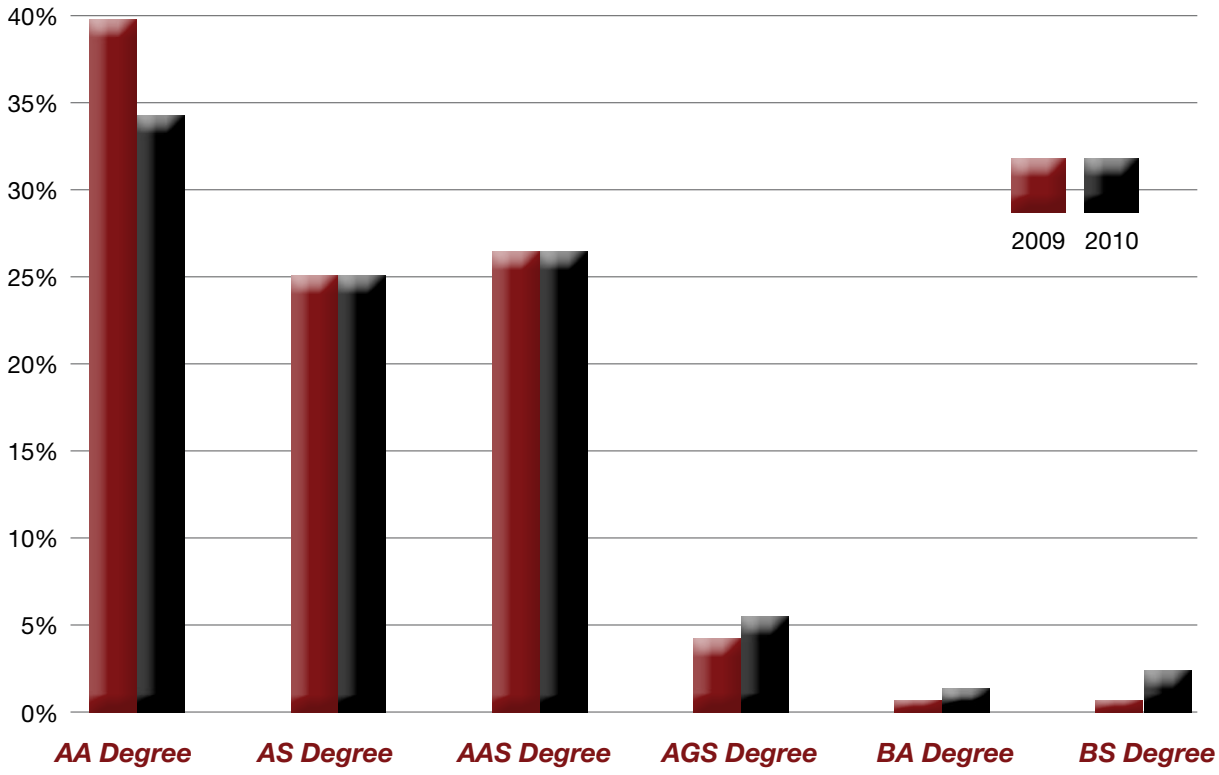
Online Degrees. Respondents were asked to indicate whether their institution offers online degree programs. The survey defined an online degree as a course of study in which "at least 70 percent of coursework need to complete the degree is available online." Eighty-one percent of respondents reported they offer at least one online degree—a six percent increase over the previous year. Table 2 offers a percentage breakdown by degree type.

Challenges for Administrators

"Understanding from senior administration continues to be the most difficult hurdle many small colleges face in growing and improving distance learning offerings to even attempt to keep up with student demand. Lack of faculty buy-in to innovation and technology and constrictions on training are also great concerns. In this time of increasing scrutiny and oversight, being a small college distance learning administrator is often an overwhelming responsibility that feels lonely and thankless."

—2010 ITC Survey Respondent

TABLE 2: Online Degrees Offered by Degree Type



Course Enrollment Caps. Eighty-one percent of respondents indicated they cap online class enrollments—a figure that has not substantially changed during the previous four surveys. The typical enrollment cap by class type remained the same.

- 27 students for an introductory math class
- 25 students for an introductory English composition class
- 30 students for an introductory political science class

Class Hosting. The survey data confirmed that more colleges outsource the hosting services (i.e. servers) to a third party or as part of a consortium for their online classes as compared to previous years. This shift may reflect budget and staffing reductions at a growing number of institutions, due to the economy.

- 39 percent of respondents own and maintain their own servers—down from 50 percent in 2008 and unchanged from last year.
- 48 percent of respondents outsourced their server needs to a third party, such as a learning management system provider, publisher or IT provider—up from 36 percent last year.
- 13 percent of respondents shared servers with others, such as a state system, district or consortium—down seven percent from last year.

Course Content Development. Colleges can use their faculty, instructional designers and administrative staff to develop their online course content, use materials offered by a textbook publisher, or purchase content from a online course content provider. As noted above, finding adequate support staff continues to be a challenge to community college administrators—especially those support staff who are experienced in instructional design.

The 2010 Survey once again confirmed that most colleges develop their own content:

- 72 percent develop their own content.
- 21 percent use publisher content.
- 5 percent contract or license materials from a content provider.

Most Difficult Classes. Respondents identified the classes that are the most difficult to offer online for various reasons, such as faculty resistance and/or pedagogical challenges. This list has not changed for the duration of the ITC Survey.

The most difficult classes listed include:

- Lab-based sciences
- Speech
- Clinical requirements
- Fine arts
- Nursing
- Math
- Industrial technology
- Foreign language
- Computer hardware

Course Equivalency. Accreditation standards require that distance education courses—content, and rigor—be equivalent (or better) to those courses that are offered in a face-to-face environment. In 2010, 95 percent of the survey respondents indicated their online classes were "equivalent" or "superior" to traditional instruction at their campus. This is up four percentage points from last year. Only five percent indicated their online classes were "inferior."

"Quality of online courses has emerged as a real concern. Issues include: meeting or exceeding retention levels of traditional classes, consistency of course design, adequate assessment, evaluation of faculty, whether or not developmental classes should be taught online and student readiness to take an online class."

—2010 ITC Survey Respondent

Services and Technology Support. In addition to offering the same academic rigor and content in their online courses, regional accrediting agencies require that institutions offer equivalent student services and support to their distance learning students. With growing numbers of online students, campuses are recognizing the need to introduce or expand their virtual services and support. The 2010 Survey results confirmed data from previous years: colleges have consistently increased their efforts to offer online students a broad array of services. In spite of budget and staff reductions, campuses continued to expand their virtual student services—not only to support their online students, but also to help their face-to-face students. See Chart 2 below for details.

CHART 2: Status Report—Student Services and Technology Support

Service/Technology	Currently offer			Plan to offer in next year			Plan to offer in two or more years		No plan to offer	
	2010	2009	2005	2010	2009	2005	2010	2009	2010	2009
Audio/video streaming	77%	74%	46%	9%	4%	20%	7%	11%	7%	6%
Campus testing center for distance education students	81%	76%	69%	5%	1%	3%	1%	5%	12%	13%
Dedicated Web site for distance education program and students	88%	90%	80%	4%	4%	6%	1%	1%	7%	1%
Distance education-specific faculty training	95%	90%	92%	4%	4%	4%	0	1%	1%	1%
Help Desk and technical support for distance education faculty	94%	91%	91%	2%	2%	5%	2%	2%	1%	1%
Help Desk and technical support for distance education students	93%	89%	86%	2%	5%	11%	2%	1%	2%	1%
Online admission to institution	94%	85%	77%	4%	5%	14%	1%	5%	1%	1%
Online counseling and advising services	60%	57%	49%	17%	21%	27%	14%	13%	9%	5%
Online information and application for financial aid	86%	86%	80%	6%	7%	15%	5%	3%	2%	1%
Online library services and resources	94%	94%	98%	4%	1%	1%	1%	0%	1%	1%
Online payment of tuition and fees	93%	87%	77%	5%	4%	15%	1%	3%	1%	3%
Online plagiarism evaluation	53%	54%	40%	23%	13%	25%	11%	9%	13%	20%
Online registration for classes	94%	91%	86%	2%	2%	9%	2%	1%	1%	1%
Online student course evaluation	85%	87%	83%	8%	4%	11%	4%	4%	4%	1%
Online student organization, Web site and services	54%	44%	42%	21%	14%	20%	13%	17%	13%	20%
Online student orientation for distance education classes	79%	70%	75%	16%	17%	17%	2%	5%	2%	4%
Online textbook sales	75%	73%	70%	8%	9%	7%	5%	4%	13%	9%
Online tutoring assistance	71%	65%	44%	17%	13%	15%	9%	8%	4%	10%
Campus Web portal	73%	62%	NA	14%	9%	NA	6%	12%	7%	13%
Audio Podcasting	69%	63%	NA	20%	13%	NA	4%	9%	8%	11%
Vodcasting	59%	53%	NA	24%	17%	NA	1%	14%	6%	11%

Distance Education Fees. Forty percent of the respondents reported they charge students an additional per-credit fee to take distance education classes. Similar to the 2008 data, the minimum collected was $2, the maximum was $80, with a median average of $22. Some campuses are beginning to integrate related program costs into existing budgets, reducing the need for a separate fee. Other campuses shift new costs onto students to make up for budget shortfalls.

The issue of whether to assess a separate student fee is tied closely to the institution's culture and the number of fees the college already assesses to students. This data has remained unchanged in spite of budget reductions. Although some campuses have shifted their eLearning programs to self-supporting (or assisted) models, most programs continue to receive mainstream budget support.

COURSE FORMATS IN TECHNOLOGY-MEDIATED INSTRUCTION

In 2008, the ITC Survey introduced several questions concerning blended/hybrid and Web-facilitated courses. The survey defined a blended or hybrid course as one that blends online with face-to-face delivery: 30 to 79 percent of content is delivered online, with online discussions and some face-to-face meetings. A "Web-facilitated" course—also known as a "Web-enhanced" or "Web-assisted" course—is a face-to-face course that uses the Web to facilitate activities, and delivers one to 29 percent of content online. Instructors often use a learning management system, blog or other type of Web site to post the syllabus and assignments.

Type of Course Formats Offered

Respondents identified the types of technology-delivered credit courses offered by their institution by specific format. The percentages were essentially unchanged from 2008 (note that respondents could identify more than one format).

- 65 percent of respondents offer completely online classes—down from 75 percent last year.
- 21 percent offer blended/hybrid courses—up from 15 percent last year.
- One percent offer cable/telecourse courses—unchanged from last year.
- One percent offer other forms of telecourse classes—unchanged from last year.
- Four percent offer live interactive video courses—up one percent from last year.

Blended/Hybrid Courses

- 71 percent continue to increase the number of blended/hybrid courses each term—up from 53 percent last year.
- 18 percent offer about the same number of these courses each term.
- Six percent are beginning to offer these classes for the first time.
- Four percent do not offer blended/hybrid courses.

"Our program has several challenges: the need for quality assurance for the course development process, as well as for a qualified instructional designer."

—2010 ITC Survey Respondent

Web-assisted/Web-enhanced/Web-facilitated Courses

- 86 percent report they continue to increase the number of these classes each term—up from 77 percent last year.
- Nine percent offer about the same number of these classes each term.

Interactive Video Courses

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

- 28 percent have deactivated their live interactive video network or have never offered live interactive video courses—down from 40 percent last year.
- 32 percent are offering the same number of live interactive video courses each term.
- 23 percent are reducing the number of live interactive video courses each term—unchanged from last year.
- 17 percent are continuing to increase the number of live interactive video courses each term—down from 26 percent last year.

FACULTY QUESTIONS

Challenges. Administrators described their greatest challenges related to faculty. For the first six years of the survey, addressing faculty workload issues remained their major challenge. In the 2010 survey, training replaced workload issues as the number one challenge for the first time. Comments from respondents confirmed their growing difficulty finding and training qualified faculty. There is remarkable consistency in all of the rankings. See Chart 3.

CHART 3: Greatest Challenges Administrators Face Regarding Distance Learning Faculty

Range for responses—1 represents the greatest challenge, while 7 is the least challenging.

Challenge	Rank 2010	Rank 2009	Rank 2008	Rank 2007	Rank 2006	Rank 2005	Rank 2004
Training	1	2	2	2	2	3	4
Workload issues	2	1	1	1	1	1	1
Compensation	3	5	3	3	3	5	2
Technical support	4	6	4	5	5	6	5
Buy-in to electronically-delivered instruction	5	4	5	4	4	4	3
Recruitment	6	3	6	6	6	2	6
Intellectual property/ownership issues	7	7	7	7	7	7	7

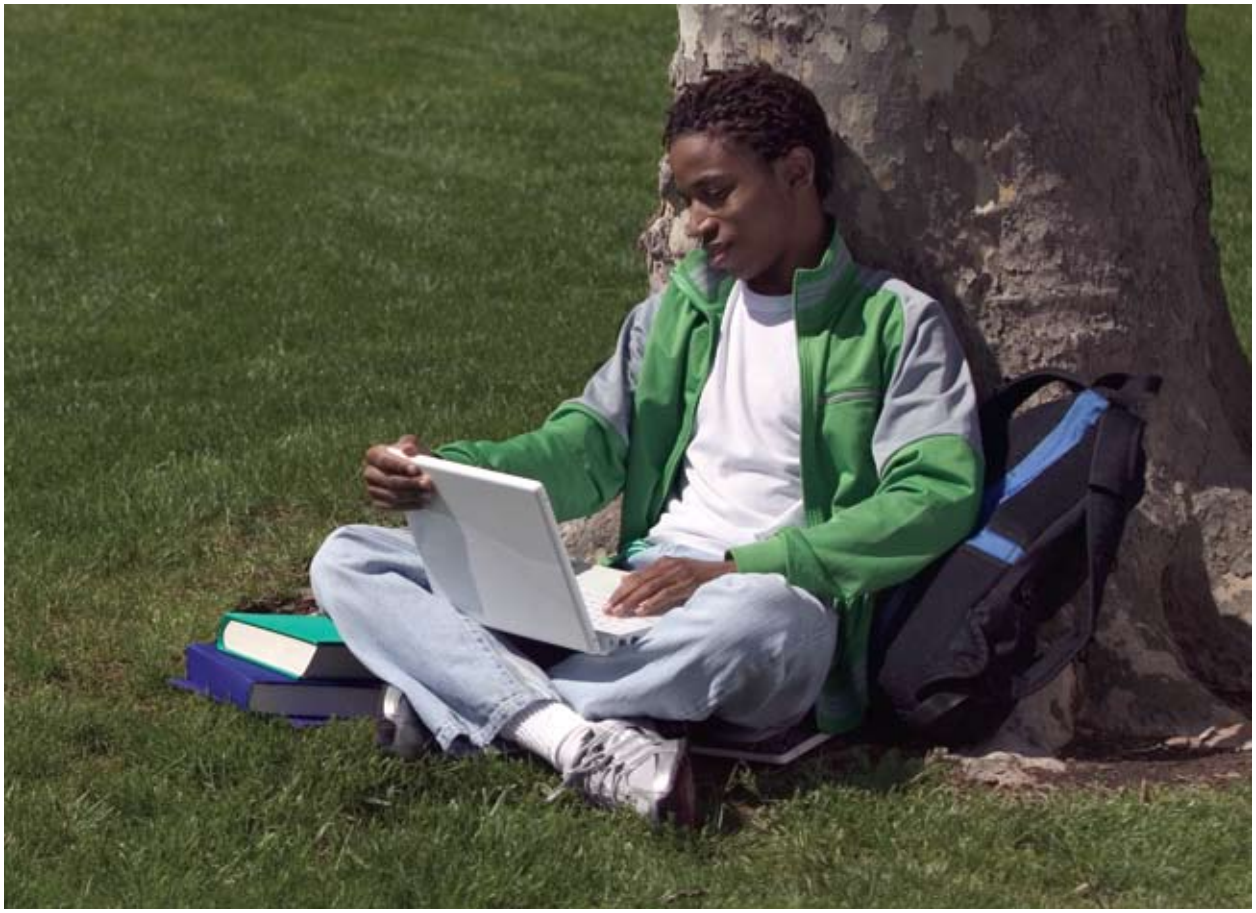
Faculty Training. Sixty-three percent of the respondents indicated faculty participation in training programs for distance education was mandatory—a figure consistent with data collected during the past four surveys. Those who responded "yes" were asked to identify how many hours of training were required—a number that continues to increase. Most indicated that "more than eight hours" of training are required for online faculty. This figure is consistent with data from previous surveys.

Teaching Ratios for Online Instruction. Respondents reported that full-time faculty teach 64 percent of distance education classes, while part-time faculty teach 35 percent of these courses. This ratio has remained essentially unchanged for the past four surveys and aligns with the historic full-time/part-time faculty percentages for face-to-face classes at most community colleges. Comments focused on the increasing difficulty of finding qualified online faculty to teach—especially when recruiting from the local community.

Challenges for Administrators

"Everyone is doing more with less, to the point where there is little to no time to develop people professionally in online technology or pedagogy."

—2010 ITC Survey Respondent



Faculty Location. Forty percent of respondents indicated that their college allows full-time faculty members to be located off-campus in another city or state. This is a significant increase from previous years. Many colleges are uncomfortable with the idea of having full-time faculty who are not physically working on campus—or even in the community. It requires rethinking the culture of a physical office, fixed office hours and other professional mores. However, most campuses have saturated their use of existing full-time faculty members who are interested in teaching online. Consequently, many have begun recruiting statewide, regionally, or nationally, where they are more likely to find faculty who have already been trained to teach virtually and have a proven track record. Many states have addressed initial work-related barriers such as worker's comp coverage. The age of telecommuting is increasingly at hand for community college campuses.

Limiting the Number of Classes Taught A third of campuses in the survey limit the number of online class sections a full-time faculty member can teach each term. Sixty-seven percent allow for flexibility and normally stipulate that course loads be determined by the appropriate chair and the faculty member.

Challenges for Administrators

"Navigating political minefields with [the] union and administrative issues; getting buy-in to some kind of standard development process."

—2010 ITC Survey Respondent

STUDENT QUESTIONS

The ITC Survey continues to affirm what seems to be obvious—students like online classes and they want more of them. Nearly all of the administrators who responded to the survey reported an endless supply of students who are interested in taking classes online—with a constant gap between student demand and what is offered. Recent budget cutbacks have exacerbated the situation by reducing, rather than increasing, the number of online class sections available.

Online administrators increasingly report the need to better prepare students for online instruction through structured orientations and computer skills assessment. Administrators also emphasize the need to improve overall student course retention and student persistence rates. Assessment of online instruction and adequate technical support remain important.

CHART 4: Greatest Challenges for Students Enrolled in Distance Education Classes

Range of responses—1 represents the greatest challenge, while 8 is the least challenging.

Challenge	Rank 2010	Rank 2009	Rank 2008	Rank 2007	Rank 2006	Rank 2005	Rank 2004
Assessing student learning and performance in distance education classes	1	2	1	3	2	2	2
Orientation/preparation for taking distance education classes	2	1	2	2	1	1	1
Low student completion rate	3	6	4	6	5	4	6
Computer problems/technical support	4	3	3	4	3	6	3
Providing equivalent student services virtually	5	4	5	5	4	3	4
Completion of student evaluations	6	5	6	1	6	5	5
Cheating	7	7	7	7	7	-	7
Recruitment/interest in distance education by students	8	8	8	8	8	8	8

"Students are often not ready to be successful online students. The challenge is being able to identify students that need additional computer skills or study skills preparation—and getting them to do it."

—2010 ITC Survey Respondent

Completion Rates. Online administrators continue to deal with the issue of lower student retention or completion rates than traditional face-to-face instruction. During the early years of online education, retention/completion could easily fall below 50 percent. However, colleges have progressed in addressing this challenge—in 2010, administrators reported that the average retention or completion rate for online classes was 69 percent, compared to 75 percent for traditional face-to-face courses. Based on six years of data, the trend in online retention has continued to improve, but challenges remain.

Traditional vs. Nontraditional Students. Many expect the millennial generation to dominate online classes, given their reputation for being tech-savvy and technology-obsessed. However, the ITC Survey confirmed that older students are just as likely to take online classes as their younger counterparts. Older "nontraditional" students are interested in the access and flexibility online courses provide. Although this age group might not be as comfortable with technology as younger students, they are more motivated to succeed and have higher GPA and completion rates than those who just graduated from high school. The ITC Survey found:

- 50 percent of online students are traditional (age 18-25)
- 50 percent of online students are non-traditional (age 26+)

Gender. The ITC Survey has consistently confirmed that more women take online classes.

The gender breakdown for student enrollments for distance education classes is:

- 63 percent female
- 37 percent male

Student Demand. Administrators were asked to report on how successfully their college is able to meet identified student demand for online instruction. Most programs continue to fall short.

This data has been consistent for the past three years:

- 68 percent report that demand exceeds their distance education class offerings
- 32 percent report that demand is being met

Student Authentication. In 2008, the Higher Education Opportunities Act (HEOA) required that distance education administrators create "processes that establish that the student who registers in a distance education course or program is the same student who participates in and completes the program and receives the academic credit." In its corresponding regulations, the Department of Education required accreditors to ensure that colleges authenticate students by using a secure login and pass code, proctored examinations, or "any new or other technologies and practices that are effective in verifying student identification."

Since 2008, ITC Survey respondents have reported a high level of compliance with the requirement:

- 98.48 percent require authentication
- 1.52 percent do not require authentication

"Keeping up with technology. Also, the impact that new laws will have on distance education and the associated costs."

—2010 ITC Survey Respondent

"Budgetary issues are not allowing us to increase the online offerings to meet the demand."

—2010 ITC Survey Respondent

OBSERVATIONS AND TRENDS

The ITC Survey is in its sixth year. Continuity in a number of response areas have emerged and many distance education programs face similar challenges.

Key observations and trends include:

- Demand for distance education by community college students continues to grow—at an accelerated rate. The growth is occurring in traditional and nontraditional age categories.
- As online instruction continues to mature, distance education administrators see a continuing need to address course quality and design, faculty training and preparation, course assessment, to improve student readiness and retention.
- Growth in the use of blended/hybrid and Web-assisted, Web-enhanced, and Web-facilitated classes continues.
- The gap between distance learning and face-to-face student completion rates has narrowed significantly, and individual campuses are reporting real progress in exceeding traditional completion rates.
- For most colleges, providing virtual student services and technology support services are a priority.
- The learning management system (LMS) market remains volatile.
- The administration of online programs has shifted from colleges' IT departments, to their academic areas and programmatic services, as distance education has become more mainstream and increased in visibility and importance.
- Many colleges continue to see challenges addressing accessibility issues, such as Section 504 and 508 compliance.
- Nearly all colleges already authenticate student access to online courses.

IS YOUR PROGRAM TYPICAL?

Online program administrators always wonder how their program compares to other institutions. Is their program typical or consistent with national trends? Six years of survey data can allow us to provide a generalized composite of a typical online program. Note that individual programs can be, and are, highly successful even if they do not reflect these generalized characteristics – this often depends on the culture of the institution and how well they are able to "work their magic" to serve their students.

The typical online program:

1. Is the primary source of student enrollment growth at its institution.
2. Does not offer enough courses to meet student demand.
3. Increases access to higher education.
4. Is comprised of a nearly equal number of traditional and nontraditional students.
5. Reports to the academic side of the institution—typically to the dean or to positions with greater authority.
6. Is under-staffed, working in cramped conditions, and has an inadequate budget.
7. Offers approximately 160 online classes/class sections each semester.
8. Is experiencing increased use of assisted and hybrid instruction—at times resulting in a stagnation of fully-online course offerings.
9. Has become a significant agent of change at the institution, prompting increased faculty training and professional development, rethinking how we teach, and providing a catalyst for integrating technology into instruction.
10. Often leads the institution in dealing with issues of assessment, design, rigor, course quality, and understanding how students learn.
11. Struggles to obtain understanding, acceptance and support from campus leaders, who often lack direct experience with this method of teaching and learning (sometimes due to a generational disconnect from technology).

CONCLUSION

The ITC board of directors created this survey to provide valuable information to distance education practitioners. ITC strives to identify relevant data and ensure its timely tabulation and distribution. The distance education landscape is changing rapidly, and the need for relevant data and information has never been more important.

Distance education is new to most senior college administrators who are being asked to support new staffing, space, and budget requests—often with a fixed or shrinking budget. Frequently they have little, if any, direct experience managing distance education programs. College administrators want to ensure they are making decisions that will benefit their students, faculty, staff and greater community, and make the most of limited resources.

We hope the ITC Survey has emerged as a valued and trusted source of relevant information. Each year, the ITC engages in an aggressive campaign to get the survey into the hands of key administrators and distance education practitioners. This report is distributed to ITC members, community college presidents, attendees at the AACC annual convention, and is the subject of articles in relevant publications. We will continue to do our best to empower decision makers, by providing them with information they need to address educational challenges. To that end, ITC offers this report in support of its members and the national online education community.

On behalf of the board of directions, thank you for your consideration of this document.

Sincerely,

Fred Lokken
Past-Chair, ITC Board of Directors
Associate Dean for WebCollege and Academic Support Center
Truckee Meadows Community College
Reno, Nevada

ACKNOWLEDGEMENTS

ITC would like to express its appreciation to member institutions of the Instructional Technology Council (ITC), and the American Association of Community Colleges (AACC) for their participation in this year's survey.

Special appreciation goes to the ITC board of directors, for their continued support of this project.

ITC also thanks its survey committee members, for their efforts to refine topic areas and to assist in drafting several new questions for the annual survey.

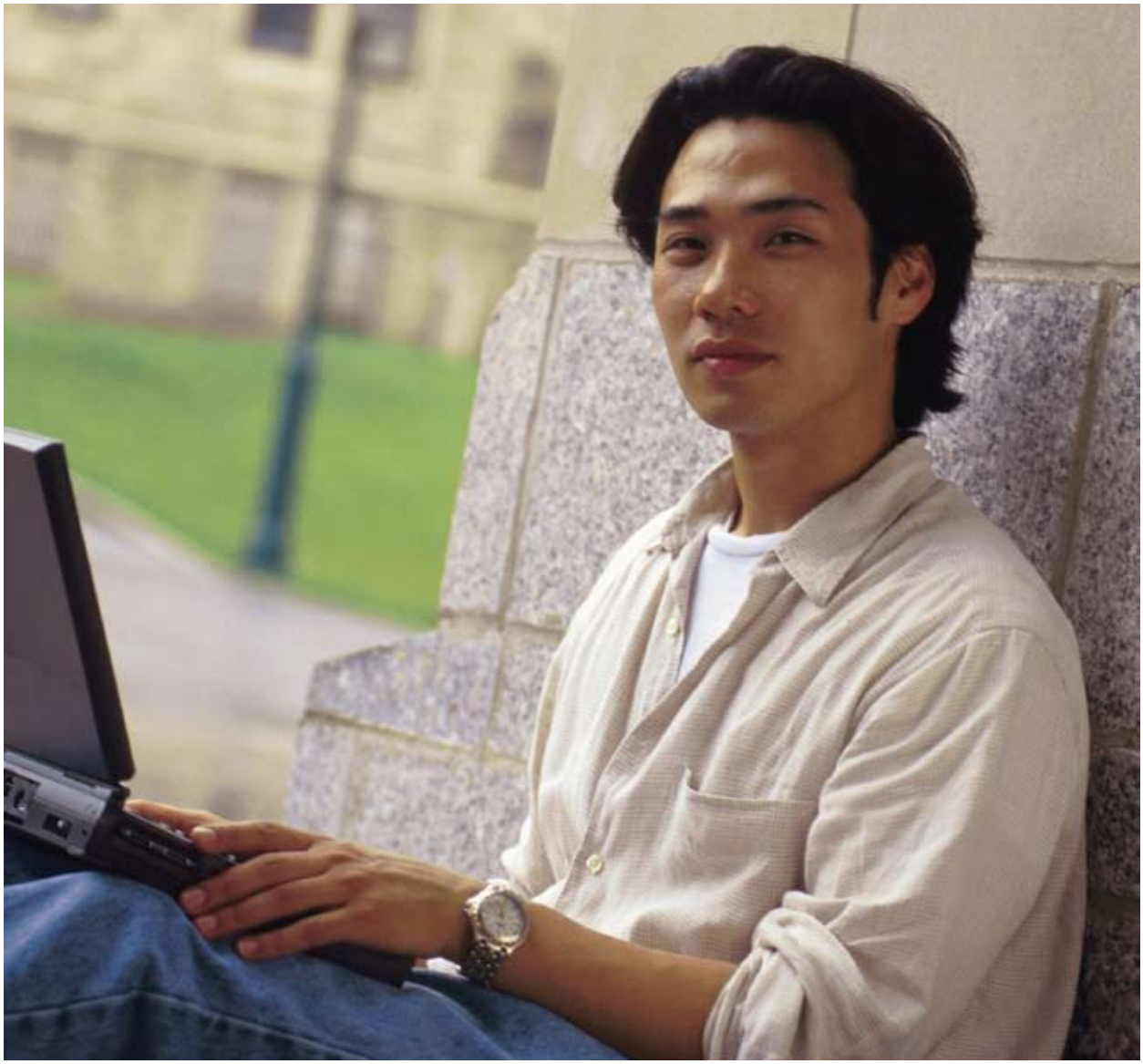
Gratitude goes to Travis Souza, the WebCollege Coordinator at Truckee Meadows Community College (TMCC), for his work in creating the online survey instrument and tabulating the results over the past six years.

Additionally, the organization thanks Christine Mullins, ITC's Executive Director, and Amy Weinfurter, Membership Services Coordinator, for their thorough editing of this year's survey.

ABOUT THE INSTRUCTIONAL TECHNOLOGY COUNCIL (ITC)

The Instructional Technology Council (ITC) is celebrating 34 years of providing exceptional leadership and professional development to its network of eLearning experts. ITC advocates, collaborates, researches and shares exemplary, innovative practices and potential in learning technologies. An affiliated council of the American Association of Community Colleges since 1977, ITC represents higher education institutions that use distance learning technologies in the United States and Canada.

ITC members receive a subscription to the ITC list serv with information on what's happening in distance education, discounts to participate in ITC's professional development Webinar series, distance learning grants information, updates on distance learning legislation, discounts to attend the annual eLearning Conference, and free access to ITC publications and research. Visit the ITC Web site at www.itcnetwork.org.



ITC BOARD OF DIRECTORS 2010-2011

Jean Runyon
Chair
Dean, Virtual Campus
Anne Arundel Community College
Arnold, Maryland

Fred Lokken
Past-Chair
Associate Dean of TMCC WebCollege
Truckee Meadows Community College
Reno, Nevada

Nancy Ragias
Treasurer
Manager, Professional Development Programs
Ohio Learning Network
Columbus, Ohio

Roy Bartels
South Central Regional Representative
Dean, College Advancement
Western Texas College
Snyder, Texas

Anne Johnson
North Central Regional Representative
Dean of Business, Social Sciences and Online Learning
Inver Hills Community College
Inver Grove Heights, Minnesota

Loraine Schmitt
Western Regional Representative
Dean, Distance Education and Academic Technology
Chemeketa Community College
Salem, Oregon

Rhonda Spells
Northeast Regional Representative
Executive Director, eLearning Services
Prince George's Community College
Largo, Maryland

Diane Thomas
Southeast Regional Representative
Director, Distance Education
Greenville Technical College
Greenville, South Carolina

Ronda Edwards
Executive Director, MCCVLC
Michigan Community College Association
Lansing, Michigan

Dan Jones
Executive Dean, Center for Instructional Systems Development
Coastline Community College
Fountain Valley, California

James Picquet
Vice President of Instruction
Dallas County Community College District
Dallas, Texas

Mickey Slimp
Executive Director
Northeast Texas Consortium of Colleges and Universities (NETnet)
Tyler, Texas

Carol Spalding
President
Rowan-Cabarrus Community College
Salisbury, North Carolina

Lynda Womer
Associate Provost
Electronic Campus
St. Petersburg College
Seminole, Florida

ITC STAFF

Christine Mullins
Executive Director
Instructional Technology Council
Washington, DC

Amy Weinfurter
Membership Services Coordinator
Instructional Technology Council
Washington, DC

Instructional Technology Council

MAY 2011

Instructional Technology Council
One Dupont Circle, N.W., Suite 360
Washington, D.C. 20036
202-293-3110
www.itcnetwork.org