

2020

ITC Annual National Distance Learning Report SURVEY RESULTS



Tracking the Impact of eLearning at Community Colleges

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Sixteen Years of the ITC Distance Learning Survey

What We Have Learned about Distance Learning

An Overview

The Instructional Technology Council's (ITC) board of directors created this survey instrument to generate data of use to Distance Learning practitioners. From the outset, the survey targeted the ITC membership comprised of predominantly two-year institutions. After all, from the inception of online learning, the community college movement embraced the value of online education to the fullest. Community colleges immediately recognized the intrinsic value of this mode of instruction - - **greatly improved access to higher education**. While universities explored online degree profit centers and questioned the legitimacy of virtual learning, community colleges created fully online classes and fully virtual degrees in response to student interest and demand. Today, community colleges enroll the majority of online students and have the largest number of online degree programs. In 2020, many community colleges presidents realize that a very significant portion of their student enrollments and FTEs are now online.

The goals of the survey and its accompanying report have always been focused on the following:

- Provide data that is specifically relevant to eLearning practitioners and especially tailored for community colleges
- Use of longitudinal data to identify significant national trends in eLearning
- Provide the type of data needed to support data-driven decision-making and to promote more strategic planning for eLearning programs
- Utilize the data and trends to support the identification of emerging national best practices
- Provide data that allows an individual eLearning program to see how they compare to national trends and best practices

The Impact And Advantages of Online Learning

Online education represents a significant paradigm shift in higher education. There is no magical date for the launch of online education, but many cite the mid-1990s when pioneering faculty and institutions shifted learning to the online environment. In the approximately twenty-five years since the inaugural online offerings, the many advantages of online learning have been documented:

- Greatly improved student access to higher education
- Virtualized learning that provides a transformational link between learning and technology
- Significant challenge to the traditional model of instruction and the development of a new modality of instruction that is a better fit for a more technology-based 21st Century
- Rapid maturation of a new modality of instruction that offers students instruction that is equal in quality to face-to-face courses

- Enrollments of seven million students at colleges and universities in the United States
- During the past ten years, a growing recognition of the role online learning can play in improving the quality and preparation of a 21st Century workforce
- With the emergence of the State Authorization Reciprocity Agreement (NC-SARA), the deconstruction of a state-centered model of higher education and course delivery
- Online education-inspired breakthroughs for teaching, learning and communicating
- Recognition that online learning offers a better fit for a rapidly transforming workforce
- The emergence of mobile devices as a new learning platform
- Transformational technology-based learning that helps to prepare new generations for a lifetime of learning and technology shifts

Online learning is now clearly mainstreamed on community college campuses as two-year institutions continue to serve as the vanguard for electronically mediated instruction. However, community colleges continue to grapple with the appropriate role and fit for online learning as well as the appropriate level of resources and support of online learning.

After 16 Years: Challenges Facing Online Education

For those who work in higher education, this rapid transformation in teaching and learning is unprecedented. Whereas the traditional classroom dates back thousands of years to Plato and Socrates, the online classroom has only been with us for some twenty years. Amazing progress has been made in gaining an understanding of the challenges as well as the opportunities of online learning. As an organization rooted in the culture of online learning – and based on the longitudinal data gathered by the ITC over the past fourteen years – it is possible to confirm the seven core challenges facing eLearning programs in 2017

1. Student readiness

Taking an online class can be challenging. The virtual learning environment requires students who are disciplined, organized, adequate computer skills, solid study skills, maturity, the ability to work independently, and must be assertive enough to ask for help when needed. Based on these criteria, traditional students (age 18-24) consequently may find taking online classes to be more challenging. These same traditional students may also be less likely to complete. We also know that online education connects with students whose work and life schedules have prevented them from attending college in the past. Although online education improves access, it may also provide a greater risk of failure for the ill-prepared student.

2. Faculty training

The 2020 survey results indicated that of those responding to the survey questions, 19 percent have no mandatory faculty training to initially teach an online course. This is shocking given the challenges associated with teaching an online class. Faculty that have not been properly trained are more likely to contribute to lower retention of students. Faculty may also miss out on the “power” to be found within the contemporary Learning Management System (LMS) and virtualized instruction.

3. Quality course design

Research has demonstrated that a well-designed course improves student success and completion. Quality design can also help to ensure adequate and appropriate student assessment as well as compliance with certain relatively new Federal regulations. Many community colleges are lagging in their ability to address quality course design and specifically lack the staffing and institutional commitment to improve the quality of online instruction. Distance Learning administrators also point out that they are hard-pressed to get faculty to engage in the development of appropriate online pedagogy.

4. Online course assessment

Many eLearning programs continue to struggle with the ability to implement an effective, consistent, and relevant online course assessment. Society increasingly demands curriculum that is relevant to the workplace, regional accreditation has been pushing hard for broader compliance with accreditation-related assessment requirements, and even students are increasingly expecting curriculum to be relevant as well. Course assessment is the vehicle to accomplish this and must be made a priority – with appropriate training and support.

5. Student completion

Completion has become the mantra for higher education in the 21st Century. Community colleges are significantly disadvantaged in fully embracing the completion agenda as their students are overwhelmingly guilty of repeatedly “stopping out”, not taking a full load of classes each term, and failing to complete a degree. Some students are “chunking” or “granulating” studies with no intent to actually earn a degree, others become overwhelmed with work and life, and some simply fail (community colleges do not have entrance standards). There has also been a disconnect between K-12 and higher education. To date, it has been hard to agree on what constitutes being “college-ready” when students graduate from high school. The student completion challenge is exacerbated by the additional challenges of virtual learning. Progress is being made, but again, resources are lacking to make significant progress.

6. Federal regulatory compliance

The election of Donald Trump has shifted efforts away from increased regulation in higher education. But the past years have also witnessed an increase in litigation – using the courts to enforce accessibility standards for instance. Obama Administration efforts to increase the accountability of for-profit educational providers has also been reversed. In addition, the US Department of Education NegReg meetings held during the spring of 2019, and a subsequent agreement, has produced a new set of regulations that do not fully accommodate the needs of community colleges.

7. Increasing competition

Some are mistaken and identify the new State Authorization Reciprocity Agreement (SARA) as a new kind of competition in higher education. Quite the contrary, the SARA agreement is an attempt to become more structured and to get out in front of a Federal regulation mandating

compliance with a consumer protection requirement for students. The SARA agreement is rather agnostic on the issue of competition – but online education by its nature has been challenging traditional service lines. The rise of for-profit online education providers has also added to the climate of competition in higher education as has the entry of public institutions and even non-profit institutions now able to more easily recruit students across state lines. Arizona State University, Western Governors University, the University of Southern New Hampshire - - the list of institutions is growing and the choices students have in higher education are increasing.

8. Needed resources and support for an institution's online program

Since the advent of online classes, institutions have grappled over issues of appropriate administration, budget, staffing and student services support. It is safe to say that at most institutions, the online program simply does not receive the level of authority nor the staff and budget necessary to be successful. This problem stems from the “newness” of online learning but also the lack of familiarity most senior administrators have with their online program, administrators, faculty and students. Regional accreditation requires that any student, regardless of the modality of course delivery, must receive equal and equivalent student support. Frankly, that likely does not occur either. Most of today's campuses are still hardwired to a different time of fixed days of operation (Monday – Friday), fixed hours for student support (8:00 a.m. – 5:00 p.m. Monday – Friday) and an expectation that the student will physically come to campus for any related student support. This inherently disadvantages the online learner. Some campuses certainly do better than others, but the concept of support is lagging behind the development of the virtual classroom and virtual learning.

9. Proper sizing of an institution's online program

Very few campuses have actually sought to identify the objectives and opportunities of their online classes, degrees, and program. Online learning has been more of an organic process evolving as an outlier to the traditional model of higher education course delivery. Nationally, the average community college online program is now around 20% of the overall enrollment. However, it is apparent that a growing number of campuses are experiencing online enrollment percentages that are as much as half (or more) of the overall enrollment. And remember, the percentage of online enrollments is generally student-driven/the result of student demand.

In the next ten years, all of the factors identified as challenges in this report, will reshape higher education in profound ways. Change will transform who we teach and well as how we teach to them. The changing nature of the student we WILL serve will necessitate change in HOW we teach. In addition, the challenge of the financial sustainability of higher education in an increasingly competitive world, will necessitate the abandonment of traditional calendars, scheduling and perhaps, even the traditional campus. For many institutions, an enrollment ratio of 75% online/25% in traditional classes will be the norm in the next 15-20 years.

ITC SURVEY HISTORY

Members of the Instructional Technology Council (ITC) board of directors created ITC's annual eLearning survey in 2004 in response to the need for 1) national data related to the growth and development of eLearning programs, and 2) tracking critical issues for eLearning administrators, faculty and students. In the first years of the national survey, it became apparent that our members wanted a stable dataset of questions that tracked the emergence and evolution of online instruction. Certainly, other organizations conducted national surveys as well, but all lacked a commitment to longitudinal data gathered on a regular basis. In addition, much of the data reported nationally has focused on enrollment at four-year institutions. For the past sixteen years, the ITC national survey has been THE ONLY annual survey of community colleges and has produced a remarkable database that documents the progressive evolution of online learning.

The ITC national survey has maintained a core set of survey questions dealing with the fundamentals of online learning but at the request of respondents, has also added several new questions in the intervening years including:

- the use of assisted web, hybrid traditional/web, and interactive video courses in 2008,
- student authentication in 2009,
- state authorization in 2011,
- the use of open educational resources in 2012
- staffing levels and LMS satisfaction in 2016
- the major survey question concerning student and support services that had been dropped for the 2013 was resurrected in 2014, again at the request of respondents.
- faculty training requirements in 2016
- use of accessibility checking software, and remote proctoring in 2017

The ITC continues to rely on its membership as the target audience for both conducting the survey as well as the focus of the annual report on data.

Survey Method

ITC members helped to develop - and have since reviewed - the survey questions to ensure the data and information generated would be of value to eLearning administrators, faculty and instructional designers. The authors of the survey sorted the questions into four major categories: general information, administrative, faculty, and students.

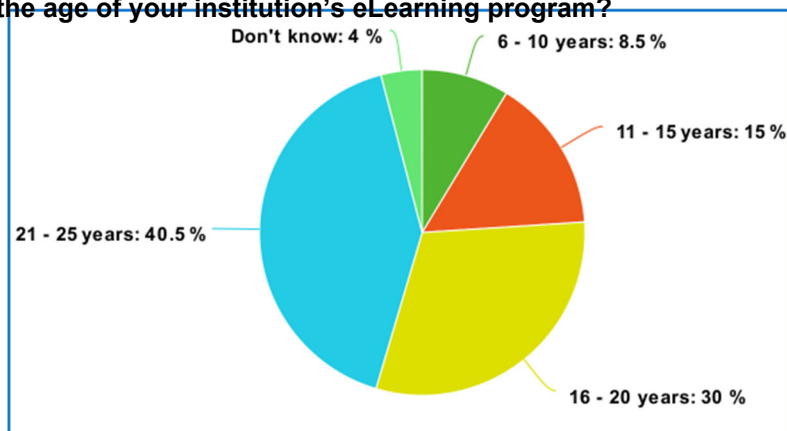
SURVEY PROCESS

The survey questions are e-mailed to all ITC members. Each year the responses are reviewed on the following criteria: an acceptable response rate, an acceptable distribution of completed surveys - from the range of institution sizes (Carnegie) and locations (ITC membership regions). For all percentages included in this report, "no answer" responses are not listed—consequently, data will not always equal 100 percent.

Typically, the eLearning administrator from each ITC member institution completes the survey on behalf of his/her institution. A review of those completing the survey since 2004 confirm a strong continuity amongst completers—70 percent of the annual submissions have come from the same campuses during the sixteen years of the survey.

Institutions Surveyed Ninety- eight percent of respondents identified themselves as associate's colleges or associate's dominant colleges based on the Carnegie classification for undergraduate instruction programs. This is consistent with previous surveys. In addition, eighty-five percent of responding institutions have had a Distance Learning program at their institution for eleven + years:

Table 1: What is the age of your institution's eLearning program?



eLearning Enrollment Growth ITC asked respondents to report comparative enrollment trends in eLearning classes from Fall 2018 to Fall 2019, the most recent full year of available data. This year, campuses reported a **10% Fall-to-Fall increase in enrollment** (up from a 4.5% increase reported in last year's survey report. Respondents reported an 8% enrollment increase two years ago. Overall, enrollments for online classes have grown for all sixteen years of the ITC survey.

Distribution of Results

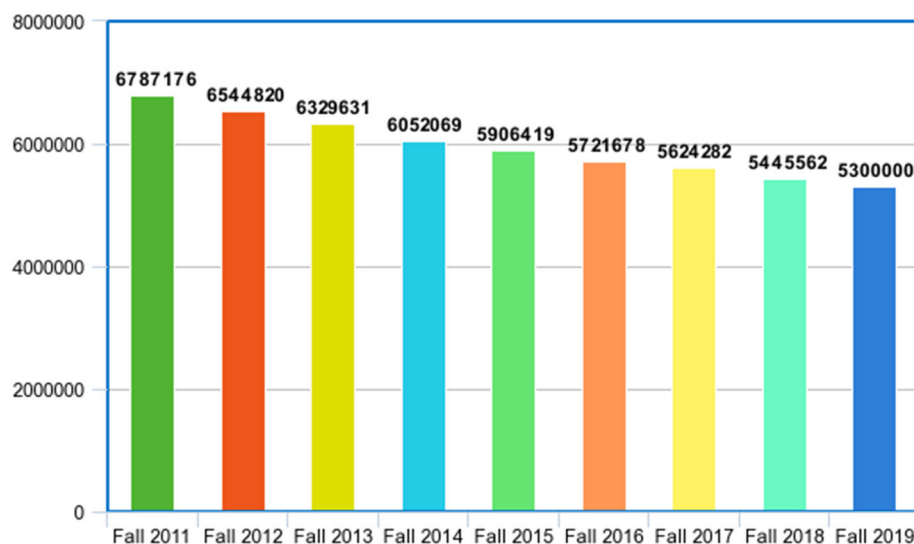
Each year, the ITC distributes survey results to all ITC members as well as to the community college presidents of all AACC-member institutions. Initial results from this year's survey were shared at the 2020 ITC eLearning Conference in Charleston, South Carolina. In addition, the ITC posts an electronic version of the results on its website at www.itcnetwork.org that is available to ITC nonmembers. Recently, the ITC has added an archive of all sixteen annual survey reports to its website as well.

2020 SURVEY RESULTS

GENERAL INFORMATION

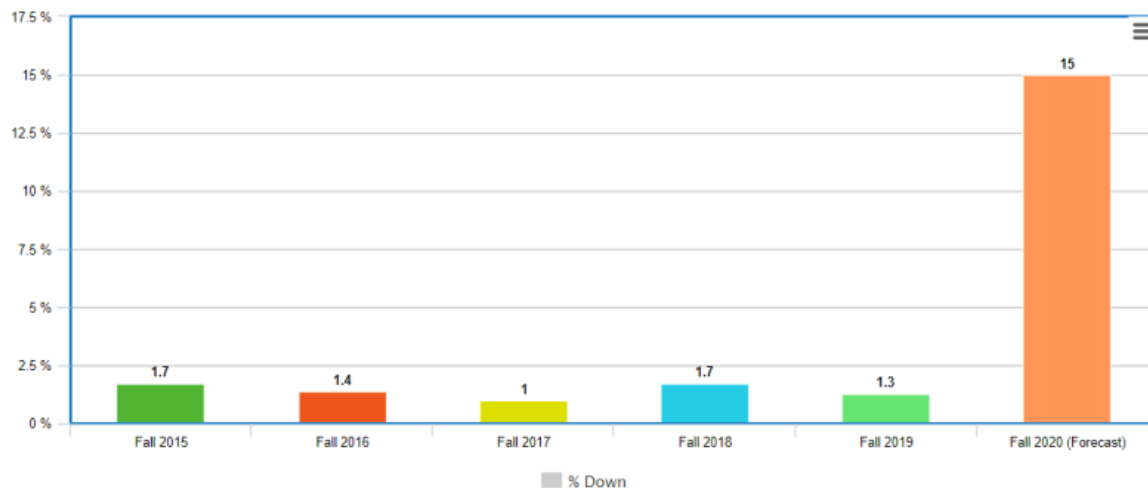
The seemingly “ever-increasing enrollment trend for online classes contrasts significantly with the overall enrolment trends for community colleges in recent years. According to The National Clearinghouse Research Center, overall community college enrollment has been in decline since before the end of the Great Recession around 2010. Recent enrollment data trends for community colleges and for US post-secondary education:

Table 2: Community College Enrollment Trends 2011-2019



Data from the National Clearinghouse Research Center
<https://nscresearchcenter.org/tag/enrollment-trends/>

Table 3: Overall Percentage Enrollment Trends For US Post-Secondary Education (2-year/4-year/public/private)

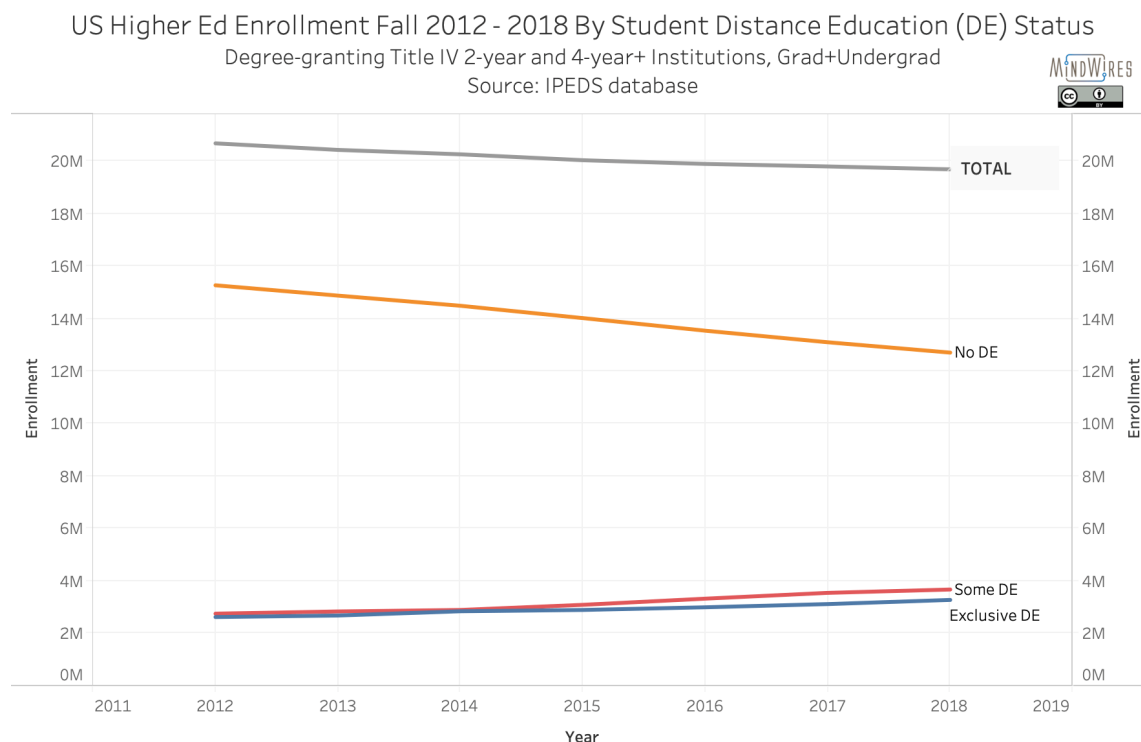


Data from the National Clearinghouse Research Center
<https://nscresearchcenter.org/tag/enrollment-trends/>

In addition to a strong economy, institutions have also been impacted by increased tuition costs, increased competition and the decline of state-level funding.

Phil Hill compiled national higher education 2012-2018 enrollment trends by modality with the following results:

Chart 1:



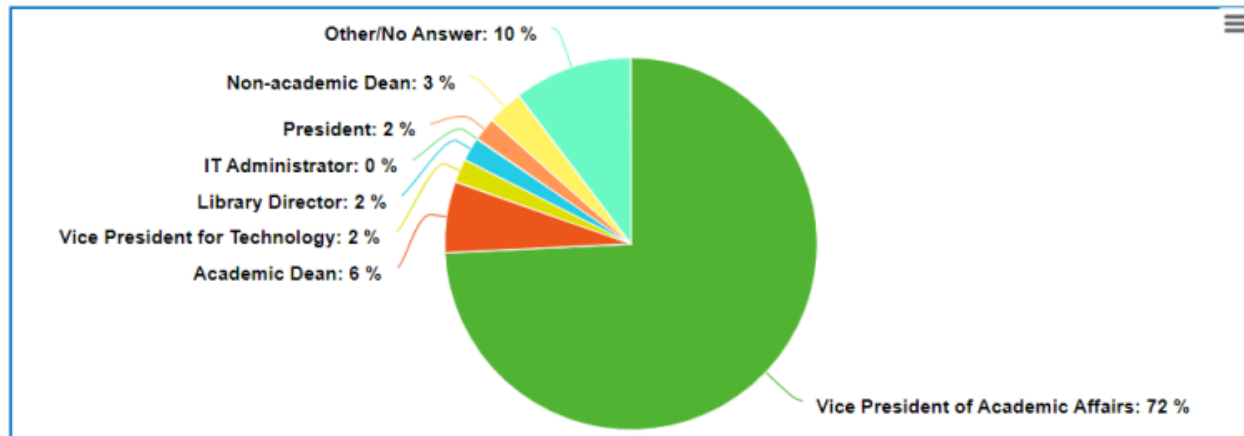
From: "US Higher Education Enrollment Trends By Distance Education Type 2012-2018"

PhilOnEdTech, December 11, 2019

We all know that distance learning/online education has been a very important part of the educational landscape for community colleges since its origins in the 1990s. As the national data suggest, online education is now important for all sectors of higher education. As Inside Higher Ed so eloquently put it, "Without online education, college and university enrollments would be declining even more." ("Online Education Ascends" Inside Higher Ed, November 7, 2018). For community colleges, this has been true since the Great Recession. As traditional enrollments first stalled and then declined, online classes have continued to demonstrate growth.

Direct Report Line In the most recent survey, 72% of respondents indicated they reported to an academic administrator. This compares with 74% in 2018 and 70% in 2017. The breakdown:

Table 4: Direct Report Line for Distance Learning Administrators



During the past sixteen years, the direct report line for key distance learning personnel has shifted significantly from non-academic to academic administrators. For this survey year, 80% of respondents indicated they report to an academic administrator (VPAA, Academic Dean or Library Director). The nexus for this trend is understandable; the credibility and success of Distance Learning has been driven by its close proximity to the “academic side of the house”. In the early years of online education, the focus was on the technology of teaching – now it is on the training of faculty, the quality of the instructional environment, and ensuring that students are adequately prepared to take an online class/program. This trend has allowed eLearning staff to more directly support their faculty and secure faculty buy-in.

CHALLENGE

- Some resistance to required Quality matters evaluation processes.
- Biggest challenge is getting the rest of the college to offer services to students who never come to campus/take all courses online
- Currently a one-person area and wear many hats to accomplish what we do for distance learning. It is difficult to remain focuses on any one area for very long, as I am pulled in many different directions daily.

—2020 ITC Survey Respondents

ADMINISTRATIVE QUESTIONS

Challenges Each year, ITC has asked eLearning administrators to rank the challenges they face with regard to administering an online program. There has been some jockeying amongst several of the challenges as well as the development of new challenges during the sixteen years of the survey. Although we have tracked some volatility with the most significant challenges, we have also noticed some remarkable stability amongst the lowest ranked challenges. Those identified challenges that have historically ranked lower include:

- Organizational acceptance
- Compliance with student authentication
- Faculty acceptance
- Compliance with new student financial aid requirements
- Institutional support from IT
- Student Acceptance

For 2020, we have “Addressing accessibility and universal design” returning as the #1 challenge for administrators. It has been a high-ranked challenge since the issue was introduced to survey respondents in 2015. The challenge of “Adequate student services for eLearning students” also has moved up one step in the rankings to #2. Apparently little attention has been given to virtual student services in the past several years. Students, however, expect all of our services to be virtualized and effective. With anticipated budget cuts this year, we will likely see this issue remain as a major challenge next year as well. The very same anticipated budget cuts will put additional pressure on Distance Learning programs as they are pushed to support ever greater numbers of faculty and students during the COVID-19 pandemic. Many Distance Learning programs have become the source not only of enrollment growth but now also for enrollment retention as campuses move to “remote” instruction due to the virus.

“Addressing accessibility and universal design” has emerged as a very significant concern on most, if not all campuses. Sometimes, even knowing what constitutes compliance can be a major part of the problem. We are witnessing increased lawsuit activity which has raised the anxiety level regarding compliance. As is usually the case, most Distance Learning programs lack adequate staff and budget resources to adequately effectively monitor compliance issues. And at a growing number of campuses, an instructional designer spearheads efforts for course compliance, but this type of staff support is in critical short supply at the community college level.

The ITC has long identified what is needed for a campus to be on the proper path to accessibility compliance. Your campus should be doing the following to demonstrate “good-faith” in your efforts to achieve access for all:

- An accessibility compliance standing committee comprised of key campus stakeholders which meets on a regular basis and is charged with:
 - developing/adopting a campus accessibility plan and timetable that includes priorities for implementation
 - ensuring the campus. Has a comprehensive plan and timetable that includes online learning, traditional classrooms, facilities, the library, technology, student services – everything that is relevant to compliance
 - monitoring progress on compliance based on an agreed-to campus plan and timetable
 - soliciting strong buy-in from senior leadership and the college staff to support and sustain conformance efforts
 - securing the creation and perpetuation of a dedicated institutional budget to fund compliance projects

- producing an annual report to map progress and challenges as well to identify any needed resources in support of compliance

This year's rankings of the Greatest Challenges for Distance Learning Program Administrators – as well as seven years of rankings – is provided below:

Table 5: Greatest Challenges for Distance Learning Program Administrators

Range for responses—1 is the greatest challenge, 14 is the least challenging

Challenge	Rank 2012	Rank 2013	Rank 2014	Rank 2015	Rank 2016	Rank 2017	Rank 2019	Rank 2020
Addressing accessibility & universal design				1	1	3	1	1
Adequate student services for eLearning students	1	1	1	2	5	1	3	2
Adequate space for training & technical assistance	9	10	11	12	9	2	8	3
Adequate administrative authority	5	3	6	4	4	12	4	4
Support staff needed for training/technical assistance	3	2	2	5	2	5	5	5
Maintaining awareness of new trends & observing best practices				6	6	6	6	6
Operating & Equipment Budgets	4	5	4	7	7	7	7	7
Institutional support from IT Department				13	13	13	13	8
Compliance with new financial aid attendance requirements¹	8	8	9	9	11	11	10	9
Compliance with student authentication	3	8	8	9	8	9	12	9
Education Opportunities Act								10
Faculty Acceptance	10	7	7	10	12	10	9	11
Organizational acceptance	11	11	10	11	10	8	11	12
Adequate assessment of eLearning classes	2	4	3	3	3	4	2	13
Student acceptance	12	12	12	14	14	14	14	14

Learning Management Systems (LMS)

The 2020 survey confirmed the growing dominance of Instructure Canvas as the leading LMS in higher education. Blackboard Learn remains in the #2 position effectively relinquishing its long-held dominance of the LMS market. During the past sixteen years, Blackboard acquisitions have dominated the Learning Management System (LMS) market. It began with Blackboard's acquisition of WebCT. By 2013, the market share for Blackboard Learn, including the acquisition of Angel Learning (which had a large number of clients), reached 58 percent. That turned out to be the high point of Blackboard market share. One year later, in 2014, our survey data indicated 43 percent of respondents used Blackboard Learn; this represented a significant decline and reflected the rise of both Canvas (Instructure) and Moodle. Blackboard then acquired MoodleRooms but continued to lose market share, especially with the end-of-life for Blackboard Angel, coupled with increased competition in the LMS market. The 2015 survey reported a 38.6 percent market share for Blackboard Learn, continuing the trend downward. Instructure Canvas showed significantly improved market share in 2018 and was identified as 36% of the respondents, and this year (2020), Canvas has 40% of the market share base and continued this trend. The rapid growth of Canvas over the past nine years has been the lead story for LMS adoptions. BrightSpace (D2L) has maintained market share while Moodle experienced a marked share fluctuation. Pearson MyLab arrived on the LMS market with a strong first year but has dropped off and now accounts for <1%. The top four LMS solutions now represent almost all of the measurable market share. Other solutions exist, but in the US market, they have not made significant headway – at least at community colleges.

Two emerging trends to monitor in the LMS market:

1. community colleges and K-12 school districts are exploring adopting the same LMS – as you can imagine, arguments for this trend include college prep as well as more coordination for dual-credit offerings
2. Instructure has had great success with consortium pricing strategies – this is leading to universities and community colleges having the same LMS as well. Again, the logic is evident: easier for students to virtually move between/amongst institutions and to promote greater collaboration and joint course offerings at a system level.

Table 6: Learning Management System Adoptions

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Canvas by Instructure²					9%	12%	16%	22.7%	23%	27%	36%	41%	40%
Blackboard Learn	38%	26%	26%	30%	35%	58%	42%	38.6%	43%	40%	34%	36%	36%
D2L/ BrightSpace	5%	7%	8%	13%	15%	11%	13%	15.8%	8%	14%	14%	13%	12%

Pearson MyLab											8%	4%	<1%
Moodle	11%	6%	9%	11%	14%	17%	15%	12%	13%	17%	6%	13%	12%
WebStudy							3%	3.9%	5%	2%	2%	0%	0%

The 2020 survey confirms that most Distance Learning programs are staying with their current LMS solution. For the past two years, 21% of respondents have indicated they are considering switching their LMS - - this represents the lowest percentage in the 16-year history of the survey. Normally, 1/3 of respondents have reported they were looking to switch. The decision to change an LMS is not an easy one. Programs will choose to live with certain shortcomings or frustrations to avoid the cost and challenges of switching their LMS. As other data in this year's survey report confirms, many respondents are increasingly satisfied with the LMS they have.

Campuses will support only ONE LMS

Again this year, eighty-five percent of respondents reported that their college restricts the number of LMS platforms it will support; down from 93% two years ago. Reasons for this type of restrictive policy include:

1. colleges have a limited number of staff to support the college LMS,
2. the amount of time and resources required to train faculty and students increase as the college supports more than one LMS,
3. the college will have to pay additional licensing and networking fees for each LMS,
4. federal and state regulations and compliance issues make it easier for colleges to monitor and manage if using just one LMS platform and
5. reduced confusion for students, faculty and staff
6. a growing understanding by faculty that an LMS is not an academic freedom right or issue
7. challenges with Third Party LMS platforms (publisher sites)

That said, some campuses view the selection of an LMS to be a faculty choice and will also permit third party LMS solutions from publishers. These types of content solutions continue to be a sore spot for many administrators and support staff since:

1. they have no access to monitor and manage,
2. the third-party LMS may not meet accessibility requirements,
3. it can be next to impossible to track students for required financial aid fraud detection, regular student engagement and weekly student activity, and
4. the campus cannot help with access and technical issues students experience related to required access codes.

Satisfaction with Learning Management System (LMS)

This question category was added in 2015. The question focuses on an institution's level of satisfaction with the key features of its Learning Management System (LMS). Contrary to predictions that the LMS would become a dinosaur by now and would be replaced with an array of autonomous cloud-based solutions, most institutions still rely heavily on their LMS to define the virtual learning classroom

experience for both students and faculty. In addition, many campuses have greatly expanded use of the LMS beyond the virtual classroom.

As other data in this report suggests, fewer institutions are seeking to replace their LMS which by inference would confirm increased satisfaction with the current LMS. Based on this year's data, strengths of the LMS for most institutions (regardless of the purveyor): Hosting and Reliability. The greatest weakness: affordability.

As the data below confirms, most institutions now relatively satisfied with their LMS solutions:

Table 7: Level of Satisfaction With LMS: 2020 Results

	Cumulative Satisfaction	Very Satisfied	Somewhat Satisfied	Neutral	Somewhat Dissatisfied	Very Dissatisfied	Cumulative Dissatisfaction
Hosting	85% (76%)	40%	45%	2%	5%	7%	12% (3%)
Tech Support	76% (60%)	36%	40%	7%	13%	4%	17% (13%)
Reliability	82% (81%)	52%	30%	7%	9%	2%	11% (7%)
Training Resources	64% (54%)	36%	29%	20%	11%	4%	15% (10%)
Ease of Use	66% (64%)	32%	34%	20%	9%	5%	14% (10%)
Accessibility/ Universal Design	71% (68%)	18%	53%	13%	9%	7%	16% (7%)
Analytics/ Reporting	40% (30%)	9%	31%	20%	24%	16%	40% (32%)
Affordability	46% (40%)	21%	25%	30%	12%	12%	24% (29%)
Customer Support	66% (63%)	23%	43%	9%	14%	11%	25% (12%)
Client Community	67% (66%)	40%	27%	18%	4%	11%	15% 12%
Features/ Functionality	64% (59%)	26%	38%	22%	7%	7%	14% (10%)

*percentages in **BOLD** are 2020 survey results

*percentages in () are 2019 survey results

Greatest strengths of a Learning Management System:

- Hosting
- Reliability

- Technical Support

Greatest weaknesses of a Learning Management System:

- Affordability
- Analytics



LMS companies have been responsive to customer frustrations based on results over the past several years that the question has been asked (since 2015). Technical Support in particular has improved significantly in the Very Satisfied/Satisfied category. Most categories have shown improvement as well. However, affordability and the quality of the analytics package have remained the areas of greatest dissatisfaction for the past five years.

CHALLENGE

- Modernizing the virtual classroom and its functionality.
- We are considering switching because of a number of factors. Currently our LMS is not meeting the needs of our students, we have poor technical support, the interface is not user friendly, we have poor mobile ability, the product is not very adaptable, and it is expensive.
- We feel an obligation to explore other systems in order to know if we are using an adequate tool, or if there is something much better for our faculty and students.

—2020 ITC Survey Respondents

Accessibility

Accessibility Compliance Since ITC began asking survey participants about the accessibility of their online courses in 2008, survey respondents' level of confidence in course compliance has been a bit of a roller coaster ride. For the past several years, respondents have expressed recurring concerns regarding their ability to address what has generally been a decline in their confidence for whether their online courses adequately comply with Section 504³ and Section 508⁴ of the Rehabilitation Act of 1973. The turning point centers on the June 2010 "Dear Colleague" letter issued by the US Department of Justice and the US Department of Education to college presidents. The letter primarily addressed the issue of accessibility to electronic book readers for students who are blind or have low vision. The letter made an unexpectedly broad statement indicating that issues associated with electronic book readers

extended to all instructional technologies.⁵ Confidence has been eroded further by a series of highly visible lawsuits filed by the American Council for the Blind. Continuing clarification of Federal regulations have also contributed to a shaking of confidence. Students now decide which sections of classes they take and that means ALL classes regardless of their modality of delivery need to be ready to actively support a student with disabilities. As this year's data affirms, campuses have a great deal of work to do to attain FULL accessibility compliance:

2020 Online Class Accessibility Compliance

All of our online classes are in compliance	6%
Most of our online classes are in compliance	40%
Some of our online classes are in compliance	53%
None of our online classes are in compliance	0%

Many ITC survey respondents have indicated their online courses are not as compliant as they should be because their program lacks adequate funding and staff resources to make the necessary changes. They also cite the absence of an institutional priority, policy or plan to address noncompliance issues. Since 2008, the ITC survey has asked respondents to indicate how compliant their campus is with Sections 504 and 508. The results correlate with the reality that most campuses do not believe they are as compliant as they need to be. But the data also confirms that incremental progress is being made.

Table 8: Trends In Accessibility Compliance 2008-2020

	Completely or mostly compliant	Some compliance
2008	73%	26%
2009	54%	21%
2010	43%	28%
2011	53%	39%
2012	52%	44%
2013	50%	47%
2014	44%	55%
2015	43%	56%
2016	37%	57%
2017	33%	61%
2019	25%	75%
2020	46%	53%


Respondents were asked which standards they follow in evaluating ADA compliance of their program's online classes. The results:

- 81% (64% in 2019) follow the Sections 504 and 508 of the Americans With Disabilities Act
- 75% (48% in 2019) follow WCAG 2.0
- 45% (23% in 2019) follow internally developed standards

As the reported percentages confirm, a sizable number of institutions attempt to comply with more than one set of standards. To be honest, there is overlap in the two most common standards, and internally developed standards normally address more unique student situations.

As concerns compliance, confusion abounds. Comments provided by respondents continue to speak to the need for clarification in the following areas:

1. what constitutes compliance,
2. what needs to be done to attain full institutional buy-in to a compliance plan,
3. what is an expected pathway (and pace) towards compliance,
4. what is expected in terms of committed resources to support compliance and
5. what constitutes “good-faith” efforts to comply

 <p>DISTANCE LEARNING <i>TREND</i></p>	<p><i>Nationally, eLearning administrators are acutely aware of the need for accessibility compliance. They have identified barriers to making progress, including a lack of needed resources (staff and funding) as well as the challenge of getting senior administration to make compliance a priority. In addition, most campuses apparently do not have an established set of policies, a formal plan, an agreed to timeline for compliance or dedicated funding to address noncompliance.</i></p>
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Online Degrees/Certificates This question was first asked in 2010. That year, sixty-eight percent of respondents indicated they were offering online certificates and degrees (USDOE definition of at least 70% of courses needed are available online). By 2014, ninety percent of respondents were offering online certificates and degrees. By 2017, ninety-five percent of respondents were offering online certificates and degrees. This data is consistent with data from the National Data Clearinghouse. We have subsequently eliminated this question and have replaced with a question asking HOW MANY online certificates and degrees are offered.

Based on the results from the 2020 survey, the average community college offers:

- 15 distinct online degrees
- 13 distinct online certificates

Community colleges have nearly universally embraced online courses and degrees and lead the nation in online enrollment and online degree options. Reasons for this include:

- community colleges serve a significant active adult learner student population (national enrollment average of 40 percent)
- the steady increase in student demand for online classes and programs,
- continued maturation of online learning, and
- national efforts, such as the community college completion agenda. Respondents reported increases across most categories of degree programs.

We also see measurable increases in the number of community colleges that offer online bachelor's degrees, a movement that has gained some national momentum. Both are positive developments and indicate a continued evolution and strengthening of distance education at community colleges.

CHALLENGE

- Time to review to make sure course are compliant (as well as) time, resources, money
- Evaluation, testing and implementation of integrated third-party platforms. Lack of participation in faculty training (no mandatory requirements)
- Faculty contract and attitudes limit the ability to increase rates of compliance. Administration is effectively shout out of online classrooms
 - Many faculty are unaware of what being in compliance means. When we discuss Alt-Tags, for example, many don't know what this means or why it is required. When we train on these topics we often hear that "it isn't my job to do that" and they want to pass the work off to an Instructional Designer (ID) or the Disability Services Department.

—2020 ITC Survey Respondents

Course Equivalency Accreditation standards require that the content and rigor of distance education courses are equivalent, or better than, that of the courses the college offers in a face-to-face environment. Since ITC's first survey in 2004, distance education administrators have consistently reported a better-than-anticipated equivalency – normally reporting that >90% of online courses are equivalent or superior to traditional courses. For 2020, the ITC survey reports an anomaly to the long-standing results: 83% of respondents reported their online courses were equivalent or superior to traditional courses, and 17% reported their online courses were in need of improvement compared to traditional courses. There is no correlating data to provide any greater dimension to this response. Certainly, there remains a substantial trend for "equivalent/superior" but this is a full ten percent decline from recent years of reporting.

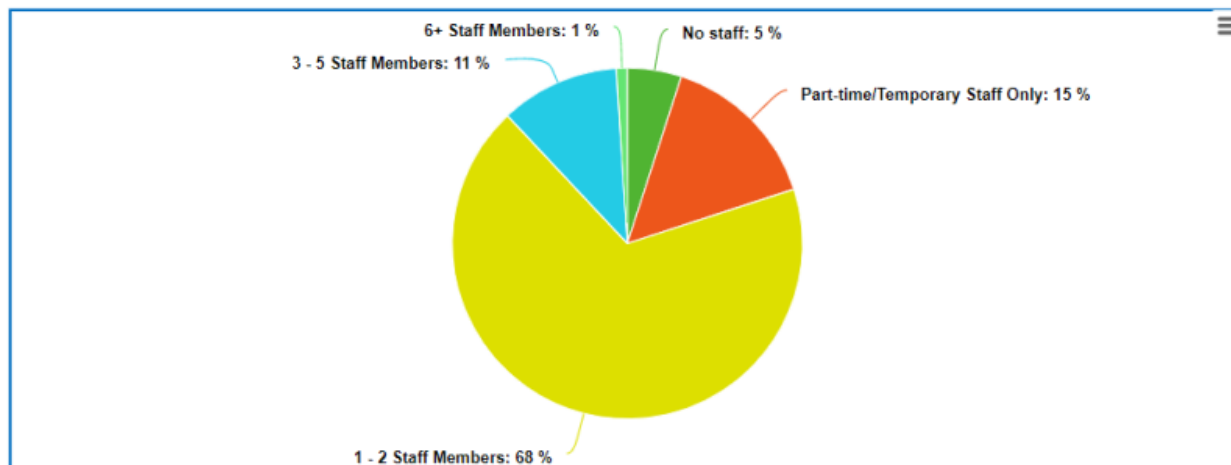


DISTANCE LEARNING
TREND

The quality of online courses has improved steadily over the years. More than eighty percent of respondents reported that their online courses are equivalent or superior to traditional courses.

eLearning Staffing Roles and Levels A new category of questions was added to the 2015 ITC survey regarding eLearning program staffing levels and staffing roles. The added questions were inspired by a recurring complaint from respondents concerning a lack of adequate staffing. It is difficult for an individual program to know if its situation is typical without broad-based data. The overall results for the past five years have confirmed that as department workloads have increased significantly regarding the number of courses, students and faculty, staffing has not kept pace:

Table 9: Distance Learning Program Staffing Levels 2020



The survey included listing specific positions. Based on responses, the most common staffed positions for a typical community college Distance Learning program are:

- Administrator (85% report having a part-time or full-time position)
- LMS Administrator (85% report having a part-time or full-time position)
- Office Support (58% report having a part-time or fulltime position)
- Faculty Trainer (58% report having a part-time or full-time position)
- Instructional Designer (56% report having a part-time or full-time position)
- Dedicated Tech Support (55% report having a part-time or full-time position)

The following positions are **NOT** common in the typical community college Distance Learning program except for the largest programs:

- Dedicated Assistive Tech (40% report having a part-time or full-time position – 53% don't have this role)
- Captioning (39% report having a part-time or full-time position – 60% don't have this role)
- Dedicated Tech Support
- Videographer (39% report having a part-time or full-time position – 60% don't have this role)
- Dedicated Student Services Support (38% report having a part-time or full-time position – 49% don't have this role)
- Dedicated eLearning Librarian (35% report having a part-time or full-time position – 45% don't have this role)

Table 10: Distance Learning Program Specific Staffing Roles 2020

	No Staff	Part-time Staff	1-2 Staff	3-5 Staff	6+ Staff
Administrator(s)	4%	17%	68%	6%	4%
Assistive Tech	53%	17%	23%	4%	2%
Captioning	60%	26%	13%	0%	2%
Faculty Trainer	28%	19%	38%	11%	4%
Instructional Designer	19%	11%	45%	17%	9%
Dedicated Librarian	45%	15%	30%	4%	6%
LMS Administrator	11%	17%	68%	4%	0%
Office Support	34%	13%	45%	6%	2%
Dedicated Student Services	49%	17%	21%	2%	11%
Dedicated Tech Support	23%	23%	32%	11%	11%
Videographer	68%	19%	11%	2%	0%

The results are most telling for programs with very limited staffing – as a one-person shop responsible for the entire Distance Learning effort, by necessity, they are a multi-tasker. They are essentially wearing an inordinate number of hats to manage the multiple key functions in support of online learning.

For those colleges with a commitment to increased staffing, the emerging best practices for a Distance Learning Team are:

CORE

1. Distance Learning Administrator
2. LMS Administrator
3. Faculty Trainer implementing mandatory initial/recurring training to teach online
4. Instructional Designer(s) implementing quality design/accessibility compliance/teaching standards
5. Office Support

ACCESSIBILITY COMPLIANCE/ENHANCED STUDENT LEARNING

6. Assistive Tech in support of accessibility compliance
7. Videographer in support of enhanced student learning/engagement plus accessibility compliance
8. Captioning in support of accessibility compliance

9. Dedicated Librarian in support of enhanced student learning/OER adoptions


IMPROVED STUDENT/FACULTY/PROGRAM SUPPORT

10. Dedicated Tech Support focused on tech support for online faculty students and faculty
11. Dedicated Student Services Support focused on online support of student services

Please Note: this list of positions serves several valuable purposes. First, it provides a comprehensive snapshot of staffing levels in online programs nationally. This allows you as an online learning practitioner, to see where your program fits in the “big picture” so to speak. This list also serves as essentially an “emerging practices” list for staffing an online program. This should help most programs as they strategize and plan for additional positions. The listing gives a sense of priorities for positions based on the strategic goals of the program.

Instructional Design and Quality Design Standards for Online Classes.

Today, a majority of colleges have at least one qualified instructional designer on their staff. Previously, many community colleges were plagued by an acute shortage of trained and experienced online instructional designers. In addition, a growing number of colleges have either adopted quality assessment rubrics and review processes, such as Quality Matters™ or created their own. These efforts have positively impacted the standardization of online course quality and have streamlined the course design and content development process at many colleges. This is a critical step forward to improving the overall quality of instruction as well as student retention and persistence.

 <p>DISTANCE LEARNING <i>TREND</i></p>	<p><i>Most community colleges have identified resources to expand professional development, faculty training, and instructional design support with a focus on course design standardization, improved course quality, improved faculty training and consistent course assessment practices. To date, most colleges rely on part-time positions to provide this support.</i></p>
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Evaluation Practices/Quality Standards Distance Learning programs have a variety of regular evaluation practices in place for online courses. 2020 data indicates the following methods to be the most commonly used:

- 70% -- utilize an administrative review
- 68% -- have established campus standards/best practices
- 55% -- use peer (faculty) evaluation
- 53% -- use student evaluations

In 2020, the ITC Survey asked a new question: *Is your program utilizing a quality standards solution? If so, which approach?*


- 21% not currently utilizing a quality standards solution
- 49% are using a nationally recognized solution (e.g. Quality Matters)
- 21% are using an internally developed or consortium-developed solution

Services and Technology Support Regional accrediting agencies require that institutions offer distance learning students support services that are equivalent to their on-campus and face-to-face counterparts. Most distance educators have learned that colleges must offer these services to help their online students succeed in the virtual environment. This survey question has been part of the mix since 2005 – we have condensed the results to a highlight format, but the fourteen-year history is relatively easy to summarize. From 2005 to 2008, we tracked the expansion of student services in support of online students. From 2008 to 2011, we tracked the contraction of student services in support of online students due to staffing and budget cutbacks at most community colleges. We dropped the question in 2012 since results had continued to track a significant contraction of student services. We re-introduced the question –at the behest of respondents in 2014, and since have been tracking the re-emergence of a trend towards expansion.

Table 11: Status Report—Student Services and Technology Support 2020

Student Service	Currently Offer	Plan to Offer Next Year	Plan to Offer in Next 2 Years	Plan to Eliminate	No Plan to Offer
Campus Web portal ⁶	76%	4%	0%	0%	17%
Dedicated Web site for distance education	68%	2%	15%	0%	15%
Online admission to institution	91%	0%	2%	0%	6%
Online registration for classes	98%	2%	0%	0%	0%
Online payment tuition & fees payment	94%	4%	0%	0%	2%
Online student orientation for online courses	77%	13%	6%	0%	4%
Online library services and resources	94%	2%	4%	0%	0%
Online counseling and advising services	66%	9%	17%	0%	9%
Online tutoring assistance	92%	6%	2%	0%	0%
Online information and application for financial aid	85%	2%	11%	0%	2%
Help desk & technical support for online faculty	96%	2%	1.6%	0%	2%
Help desk & technical support for online students	94%	2%	0%	0%	4%

24/7 Help desk & technical support for online faculty and students ⁷	51%	2%	11%	0%	36%
Online textbook sales	96%	0%	0%	0%	4%
Online student organizations, Web site & services	49%	15%	17%	0%	19%
On-campus testing center	75%	6%	3%	0%	19%
Online plagiarism evaluation	85%	2%	1.6%	0%	13%
Online student course evaluation	83%	4%	6%	0%	6%
Faculty training for online teaching	96%	4%	0%	0%	0%
Audio /video streaming capabilities	79%	6%	4%	0%	11%
Digital video repository ⁸	70%	4%	6%	2%	17%
Web conferencing or Webinar solution ⁹	92%	4%	2%	0%	1.6%
Live lecture-capture ¹⁰	66%	4%	6%	0%	23%
MOOCs classes	2%	2%	0%	4%	92%
Remote proctoring	66%	11%	9%	1.6%	15%
Accessibility checking software	54%	23%	15%	0%	8%

 <p>DISTANCE LEARNING <i>TREND</i></p>	<p><i>More colleges are expanding the virtual and student support services they offer to online students to meet the “equivalency” standard regional accreditation agencies require of online programs. In addition, the retraction that occurred during the Great Recession has ended; has in several ways persisted. Campuses have scrutinized the costs of services and have determined in several instances the ROI (Return On Investment) is not met. As online enrollments continue to increase, colleges will have to deal with the increased need and relevance for virtual services.</i></p>
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Distance Education Fees For 2020, 59 percent of respondents indicate that students are charged an additional fee for taking an online course. For those campuses that do charge students a distance education or technology fee, respondents charged an average of \$15 per credit and \$36 per course. The maximum charged was \$60. For those that completed the survey, universities charged significantly

higher fees than community colleges. Charging a fee has been a direct impact of the significant budget cuts most institutions experienced during the Great Recession. The “firewall” that had protected students from higher student fees – and tuition – fell victim to institution budget cuts that approached 50 percent for some and at least 25% for most. There are limits to both student fees, textbook costs and tuition costs.

Although some eLearning programs have self-supporting or assisted models, most receive mainstream budget funding from their college administration. Their decision for assessing a separate student fee to take a distance education course is tied closely to the institution’s culture and the number of fees the college already charges its students. Most community colleges do not like to impose additional fees on students. However, as Distance Learning enrollments continue to increase, and as funding for campuses tightens, online program administrators are expected to impose fees to absorb program costs. In fact, on many campuses, the establishment of a special DE fee coincided with efforts to off-set costs of LMS licensing, third-party student services and even staffing. For students, any Distance Learning fees are a “necessary evil” for taking an online class. Many make the parallel with buying a gallon of milk at a convenience store. Sure, it’s more expensive, but it is convenient. Distance Learning programs indicate they do NOT receive many complaints for the additional fee.

Open Educational Resources (OERs) and Online Education In 2012, the ITC survey added questions on the use of open educational resources (OERs) at community colleges. OERs are defined as accessible, openly formatted and -licensed materials and media that educators use for teaching, learning, assessment and research purposes. Efforts to develop open textbooks are a major undertaking for the OER movement and seem to be driven by three concerns on the part of educators and students:

1. the desire to reduce textbook costs for students,
2. the need to provide students access to course materials at the beginning of the school term since students often delay purchasing textbooks until they need, or can afford, the required materials. Publishers indicate that the rising cost of textbooks has fueled the reality that as many as 6 of 10 students no longer purchase required textbooks, and
- 3, the need to provide students with quality, up-to-date, content that is engaging and relevant to course curriculum.

The ITC survey traditionally asks two specific questions regarding OERs The survey results for the past several years:

Table 12: OERs: Anticipated Level of Impact At Your Campus in the Next Five Years

	2012	2020
None	-	-
Very Little	60%	23%
Significant	36%	77%

Table 13: OERs: Current Roadblocks To Adoption

	2012	2020
Lack of faculty awareness	66%	53%
Lack of ancillary materials	21%	66%
Credibility of sources	- - -	32%
Resistance from administration	13%	15%
Time needed to locate/evaluate resources	67%	87%

Based on eight years of data, it is apparent that real progress is being made to explore, create and adopt OER materials. A number of organizations such as the Community College Consortium for Open Educational Resources (CCCOER) based in California, has provided outstanding leadership as well as funding to jump-start OER exploration and development. The organization also maintains a variety of related resources. That said, clearly, challenges remain. Respondents identified the lack of ancillary materials (66%) and the time needed to locate/evaluate resources (87%) as significant barriers to OER adoption.

However, in the past eight years, recognition that OER will be significant in the next five years has moved dramatically from 36% in 2012 to 77% today.

CHALLENGE

- Lack of investment as a strategic priority for the college including support to provide an equitable experience for fully online students. Also, resistance from campus-based student services to offer flexible hours and modalities of service delivery such as early/late hours, phone advising, video chat, and so on...
- No funding to support faculty training stipends or to supplement sessions with food or prizes.
- Distance education courses, sections (new & additional) are only suggested by the eLearning department group. New ideas can only be strongly suggested to upper administration. VP of Instruction, Deans, and program chairs make all decisions about online, streaming and hybrid course offerings.

—2020 ITC Survey Respondents

COURSE FORMATS IN TECHNOLOGY-MEDIATED INSTRUCTION

In 2016, the ITC survey eliminated the series of questions regarding formats used for instruction. The data over the past several years has been consistent and confirms that most programs use a variety of modalities of delivery including: fully online, hybrid/blended and web-enhanced/assisted web/web facilitated classes. Most programs have either significantly reduced or eliminated interactive video (IAV) though this more restrictive technology still is useful in rural educational delivery as well as cable-based instruction and packaged telecourses. The same is true for telecourses and audio-only courses. The

vast majority of offerings are either fully online or hybrid – other solutions have effectively disappeared from campuses, save for those dealing with a complete absence of broadband infrastructure and/or sparse populations distributed over large service areas.

FACULTY QUESTIONS

Challenges Each year the ITC survey asks distance education administrators to rank the greatest faculty-related challenges they face. This is one of the foundation questions for the survey and has been posed every year since the launch of the ITC survey in 2004. What is remarkable is that the top five responses have generally been the top five responses for the entire fourteen years of the survey. For many, this would then confirm that the top five problems are essentially “chronic” – significant, not easy to solve and recurring. These five issues are foundational issues related to faculty and instruction; in other words, these are core issues regardless of modality of instruction. It should not be surprising that these challenges would be similar for online instruction as well. Once again for the 2020 ITC Survey, the top five challenges for administrators involving faculty are very familiar to us:

1. Engaging the faculty in development of online pedagogy
2. Evaluation of faculty
3. Workload Issues.
4. Training
5. Compensation

Table 14: Greatest Challenges Administrators Face Regarding Distance Learning Faculty 2020

Range for responses—1 is the greatest challenge, 9 is the least

Challenge	Rank	Rank
	2019	2020
Engaging faculty in developing online pedagogy	1	1
Evaluation of Faculty	2	2
Workload Issues	3	3
Training	4	4
Compensation	5	5
Technical support	8	6
Buy-in to electronically delivered instruction	6	7
Intellectual property /ownership issues	9	8
Recruitment	7	9

Faculty Training Teaching faculty to teach effectively online has been a critical component of every successful eLearning program – and has been identified repeatedly as one of the greatest challenges an administrator deals with (as discussed above). Proper training will help faculty members as well as staff

improve eLearning course quality, provide consistency across courses which will make them easier for students to understand and navigate, help recruit other online faculty members, enhance communication with and among students, and ultimately help improve student retention and success.


The ITC survey has tracked efforts to increase the length and quality of training since its launch in 2004. The good news is that most online programs have been able to increase the hours required for both initial training and recurring training during the past sixteen years. The original goal was to standardize and require at least 3-4 hours of training. As the 2020 Survey results confirm, over half of all campuses required 9+ hours representing a substantial improvement in support of faculty training as a key to course consistency, quality and student engagement.

Progress is also being made regarding recurring training requirements. The 2020 Survey results indicate a significant that 61 percent of campuses have no recurring training requirement - - this remains a very stark statistic BUT this down from 73% reporting no recurring training requirement last year. Much more progress is needed since it is very easy for faculty to become less fluent in their LMS skills as platforms continue to be updated and given more features. In addition, faculty should be exposed to new ideas about student engagement, student retention and success, course assessment, the use of new features and new technologies, etc. all of which can be lost in the absence of regular (yearly) refresher classes.

It remains very unsettling that 17% of respondents indicate there is NO TRAINING REQUIREMENT to teach an online class at their institution. Seriously.

Table 15: # of Hours Required for Initial v. Recurring Training of Online Faculty 2020

# of Training Hours	Initial Training	Recurring Training
No training required	17%	61%
Less than 2 hours required	4%	11%
3-4 hours required	9%	11%
5-6 hours required	6%	13%
7-8 hours required	6%	2%
More than 8 hours required	58%	2%

 <p>DISTANCE LEARNING <i>TREND</i></p>	<p><i>More than more than eighty percent of institutions participating in the ITC survey this year report their faculty members are required to take part in some type of training before they allow them to teach a class online. This is a significant improvement over initial survey results sixteen years ago.</i></p>
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CHALLENGE

- Faculty do not have to learn to use the LMS, much less learn pedagogy or best practices for online teaching. This creates a problem with rigor, success and retention
- There is a constant sense of faculty not having time or compensation to participate in training, which can be discouraging.
- Those that really need to be at training and PD are the ones who often don't show up.

—2020 ITC Survey Respondents

Teaching Ratios for Online Instruction In 2020, respondents reported that 58 percent of online classes are taught by full-time faculty and 42 percent are taught by part-time faculty. This is statistically consistent with data since 2013 and is also consistent with the historical full-time/part-time faculty ratio for teaching traditional courses at community colleges. Respondents also indicated that they continue to have a hard time finding qualified faculty to teach online for certain subjects (hard sciences, foreign languages, health/medical, etc.).

Faculty Location This question has also been a fixture of the ITC Survey for several years. A dynamic of community colleges is their reluctance to hire “remote-located” faculty. That has historically been reflected in the annual question regarding faculty location: for 2020:

- 79 percent teach on campus
- 18 percent are in the same state
- 3 percent are in other states

Historically, few administrators look beyond their own faculty members when they recruit online instructors and they tend to hire in their own backyard. For many campuses, the “local” pool of online faculty—especially those who are trained and can teach successfully online—has diminished as competition has grown for online teaching experience. At the same time, most have saturated their use of existing full-time faculty. Going forward, by necessity, campuses will need to recruit beyond the immediate area to secure the number of part-time or adjunct faculty they need to teach their online classes.

Limiting the Number of Classes Taught Another perennial ITC survey question; respondents indicate that their colleges regularly limit the number of courses they allow a full-time faculty member to teach online per term. Reasons for imposing a limit vary but the most common justifications include:

1. Negotiated cap (faculty union)
2. Difficulty finding faculty to teach traditional classes – especially at certain times of the day
3. Ensure that faculty are on campus to interact with students, colleagues and administrators
4. Individual academic department policy, and/or
5. Concerns raised by faculty who only teach traditional classes.

For 2020, respondents reported that colleges typically restrict their faculty from teaching more than 67 percent of load—normally three classes per term for a community college teaching load of fifteen credits. This has been consistent for the past several years.

Some campuses are exploring allowing full-time faculty to teach fully online and/or reside in a different city or state. Sometimes they find the talented faculty member they need but learn he or she does not want to relocate. Although online instruction opens the door to greater creativity, the culture can remain restrictive and many community college administrators appear reluctant to support this. The longer-term consequence of not doing so could be an adverse impact on the quality of online instruction.

STUDENT QUESTIONS

The ITC survey continues to affirm that student demand for online courses and degree programs remains strong, although it is not near the legendary growth and demand years before the Great Recession. That type of explosive growth was not sustainable and frankly was overwhelming for the limited distance learning and student support staffing at most community colleges - - which we might add remains a major challenge for most community college Distance Learning programs.

Most administrators continue to report a gap between student demand and the number of online courses colleges offer. Distance Learning has been the only real area of growth at many community colleges for the past decade or more – and especially since the end of the Great Recession. Increasingly, colleges are starting to focus on Distance Learning course offerings to improve course quality, support improved ADA compliance, promote student engagement, standardize faculty training and responsiveness, and improve student retention and success. A critical reality of the 21st Century is increased competition in higher education. College administrators must realize that students are aware that they have more educational choices. They can attend other colleges at a distance if they do not see the courses they want or receive the excellent customer service and support they need.

Meanwhile, students continue to be somewhat misinformed about online learning. Many want to believe it is easier, but research has confirmed the average successful online student normally spends more “homework” time online than in a traditional class. Any distance learning administrator will also emphasize the need for maturity, initiative, and the ability to work independently as critical attributes for online student success. Students can be tech-savvy when using social media and communications tools but lack the necessary basic computer skills to take online courses. These concerns coincide with a national call to improve overall student retention and persistence rates and help more students graduate prepared to compete in the 21st century workplace. The challenge for eLearning administrators is to find effective ways to better prepare students to be successful in the virtual classroom.

An essential partnership on any campus is the one that links students, faculty, appropriate student services and the distance learning program. Improved student success – retention and persistence – can only occur if these four elements are working in unison and “on the same page”. This relationship also needs to be adequately staffed and fiscally supported (e.g. needed software, third party solutions, etc.).


Campuses also need to be data-driven in addressing the needs of students. For our part, the ITC survey has always tracked the greatest administrative challenges dealing with students and provides updated survey data regarding the key challenges for students.

For the 2020 ITC Survey, volatility remains for the top three challenges. This has been a hallmark of this particular set of challenges since the beginning of the ITC survey sixteen years ago. We can offer no compelling explanation for the constant rotation of the top three challenges other than to point out that all three are of critical importance AND also critical to the success of the students in online classes.

Table 16: Greatest Administrative Challenges: Students Enrolled in DL Classes 2020

Range for responses—1 is the greatest challenge, 9 is the least

Challenge	Rank 2019	Rank 2020
Assessing online student learning and performance	3	1
Orientation and preparation for learning online	1	2
Providing equivalent virtual student services	2	3
Low student completion rate	4	4
Computer problems and technical support	5	5
Cheating	6	6
Completion of student evaluations	5	7
Online student recruitment	8	8
Disruptive student behavior		9

 <p>DISTANCE LEARNING TREND</p>	<p><i>Assessing student learning and performance, student orientation, student completion and the need for equivalent services and student preparedness have dominated the ranking of challenges rankings for the past fourteen years. Community colleges students historically deal with more obstacles than university-level students.</i></p>
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Completion Rates During the sixteen years of the ITC Survey, respondents have documented significant improvements in distance education courses—in terms of quality, consistency, design and structure. The results indicate Distance Learning has also experienced an equally significant improvement in overall student retention. The trend in online retention continues to improve, but challenges remain and addressing the gap is a major priority for many programs.

In 2020, respondents compared their online retention rates with the retention rates for traditional instruction at their colleges. The results suggest nominal improvement in online class completion rates:

- 40% of respondents reported that their retention is comparable for online and face-to-face instruction at their college - - 36% in 2019
- 55 percent reported that their retention is lower for online classes than for face-to-face instruction at their college - - 61% in 2019
- 0 percent said retention is higher for online classes than for face-to-face instruction at their college - - unchanged from 2019

Since 2016, the ITC Survey has included a question designed to track the various strategies distance learning programs are using to improve student success. The adoption of performance-based funding for a growing number of campuses/systems has increased pressure on all instructional modalities to improve overall retention, persistence and completion rates for students

Table 17: Top Strategies To Improve Student Success 2020

Student Success Strategy	2019	2020
Analytics to identify at-risk students	47%	74.5%
Course design standards (i.e. Quality Matters, internally developed rubric, etc.)	70%	85%
Enhanced faculty training	51%	68%
Mandatory student orientation	27%	43%
Retention specialist	29%	32%
Vendor solution	8%	8.5%
Other earlier identification & intervention, no “late-add” policies, increased online advising, integrated advising & tutoring, custom made pre-assessment, on-campus demonstrations & workshops, advising, mentoring opportunities, improved student support through help-desk/on-campus demos, PD in culturally responsive teaching, developing model courses w/ quality standards & best practices	10%	19%

The top three strategies – the use of analytics to identify at-risk students, course design standards, and enhanced faculty training – represent current best practices for addressing traditionally lower retention, persistence and completion rates for eLearning students. The obvious indicator from this year’s survey results indicates campuses are far more engaged in improving student success with increased activity identified in ALL categories of the survey question.


CHALLENGE

- Student success starts with faculty that are well-trained and prepared to deliver quality content, as well as course that are created to maximize the likelihood of student success. More and more students are requesting online programs, especially nontraditional students, who work and have family obligations
- Our online registration is growing by leaps and bounds, and we need more resources to keep up with the demand. More and more of our course and degree programs are being offered online. We are using analytical data to gauge trends and to be able to offer better services and options for our students

—2020 ITC Survey Respondents

Traditional vs. Nontraditional Students Given their reputation for being tech-savvy and technology-obsessed, many expect younger students to dominate online class enrollments. However, ITC survey respondents have consistently confirmed that nontraditional students are also interested in online classes, especially since they tend to value the access and flexibility online courses offer them. Many nontraditional students might not be as comfortable using technology as their digital native counterparts, but they are often more motivated to succeed, know what they specifically want to accomplish, and have higher GPA and completion rates than those who just graduated from high school. Nationally, the average number of nontraditional students who attend community colleges is forty percent. The 2020 ITC Survey confirms that nontraditional students are similarly represented in online classes:

- 55 percent of online students are age 18-25 - - 57% in 2019
- 41 percent of online students are age 26+ - - 40% in 2019
- 4 percent of online students are active duty military - - 3% in 2019

 <p>DISTANCE LEARNING <i>TREND</i></p>	<p><i>Online classes are attractive to nontraditional students – enrollment by those 25 years or older remains strong and further demonstrates the extent of acceptance of online learning for both traditional and nontraditional students.</i></p>
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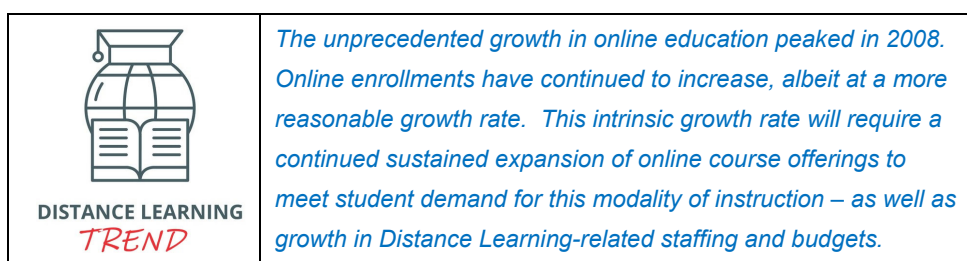
Student Demand Colleges are doing a better job meeting student demand for online courses than they have in the past. Many have increased their online course offerings while traditional course sections have decreased. Since the popularity for online learning only seems to grow, most Distance Learning programs will continue to experience enrollment growth in the foreseeable future. In fact, for the past sixteen years, online enrollments have been the basis for the overall growth in college enrollments nationally. This year's reported increase in online enrollments confirms that campuses will need to remain focused on increasing the number and variety of online courses in response to student demand.

The ITC Survey has always asked respondents the following question: Is student demand for distance learning classes at your campus being met?

The results from the 2020 survey:

- 77 percent indicate student demand is being met - - 94 percent in 2019
- 23 percent indicate student demand is exceeding current offerings - - 6 percent in 2019

This data is consistent with the overall pattern of data for this question over the sixteen years of the survey. Programs seem to be overwhelmed with demand, respond by offering more sections/choices which initially better meets that unmet demand, then another phase of significant new student demand presents itself.



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

In 2020, 98 percent of the ITC survey respondents once again indicated they use a unique username and password to authenticate students - - statistically unchanged from 2019. Based on the Inspector General’s Final Report on student fraud activities in online classes/programs, many campuses are looking to expand beyond the unique username/password in authenticating students. Cost has been the major barrier to exploring or adopting additional student authentication strategies. In addition, many programs are concerned about the adverse impact on student privacy and a relatively weak ROI (Return On Investment) for contracting with various vendor solutions. Specific data:

- 11 percent of campuses require at least one proctored (on campus/remote) exam - - 26 percent in 2019
- 26 percent of campuses utilize remote video proctoring - - 28 percent in 2019
- 13 percent of campuses utilize vendor-based identity verification - - 11 percent in 2019
- 17 percent indicate other methods to enhance authentication including: single sign-on, identify verification when flagged, required proctored exams in gateway course, 3 required identity activities per course per semester - - 19% in 2019

Online Student Examination Practices

Online testing can be problematic, and many faculty have re-designed their assessment methods to minimize cheating in the online environment (normally, low threshold for grade /high volume for quantity of class work). The 2020 ITC Survey reaffirmed that several alternatives have been used to support additional student authentication and the pattern of usage remains fairly constant:

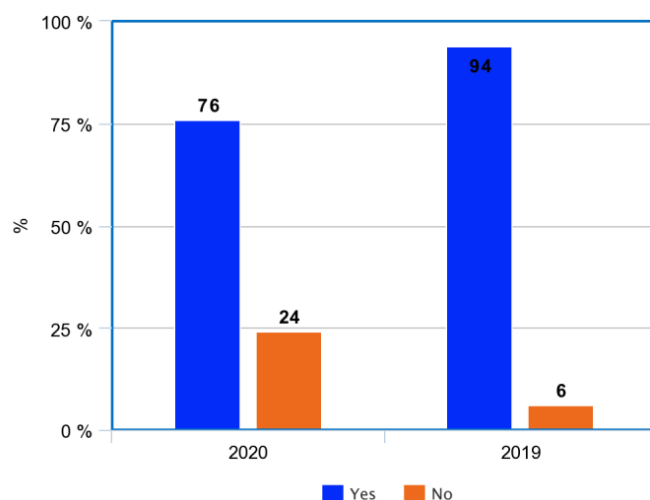
- 66 percent) allow instructors to offer exclusively online, non-proctored exams
 - - 66 percent in 2019
- 91.5 percent allow instructors to offer on campus and online testing
 - - 96 percent in 2019
- 46 percent allow instructors to offer exclusively on-campus testing
 - - 48 percent in 2019
- 78 percent allow instructors to offer remotely proctored exams
 - - 68 percent in 2019

Student Engagement In Online Classes

For the 2016 survey, two new questions were added to examine the issue of student engagement. This is a highly recognized “best practice” for any modality of instruction. Special challenges are assumed to make student engagement more difficult in the virtual learning environment, but online programs have been aggressive in increasing expectations for including identified student engagement strategies that are appropriate for virtual learners.

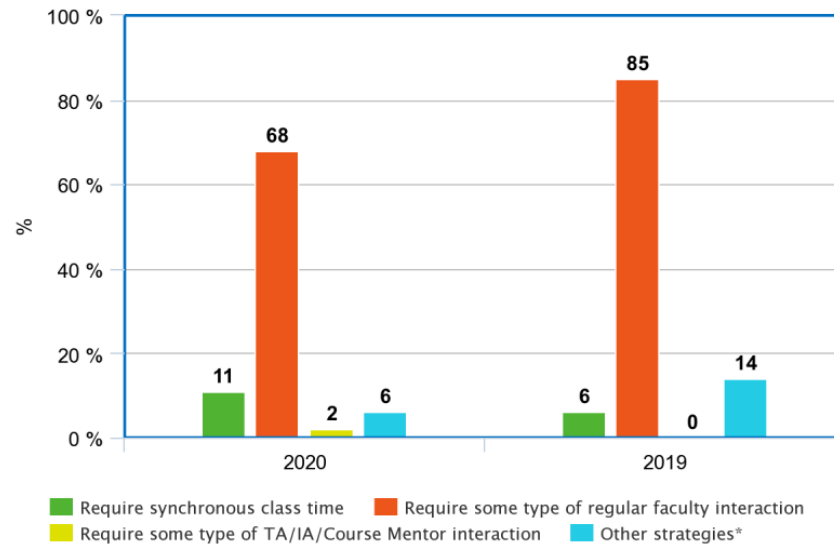
For the first question, we have witnessed a fluctuation in responses as evident in the responses from 2019 and 2020:

QUESTION: DO YOU REQUIRE SOME TYPE OF FACULTY-STUDENT ENGAGEMENT?



For the second question, the data suggests a more consistent set of responses with “required faculty interaction” the most common strategy but still reflects substantive variation in responses. For 2020:

QUESTION: WHAT FORMS OF ENGAGEMENT DO YOU REQUIRE?



* other strategies: specific office hours, student/student engagement as well as instructor-student engagement, course communication and instructor-learner interaction, active response time, student-to-student interaction and assignment feedback, discussion boards, have a protocol for regular and substantive interaction between students and instructor in online courses, required faculty/student interaction time, active response time - - 14 percent in 2019

OBSERVATIONS AND TRENDS

With the completion of the 2020 ITC National Distance Learning Survey, we have now accumulated sixteen years of longitudinal data on the practical elements of online learning at community colleges. Since ITC began surveying its members in 2004, the purposes of the project remain to:

- Develop a national database to document eLearning trends, issues, and challenges, regardless of a college’s geographic location, budget, number of students, level of staff support, or whether the college is independent or part of a district or statewide system.
- Provide data specifically relevant to eLearning practitioners.
- Use the data to determine significant trends.
- Use the data to more effectively plan and strategize for the future.
- Focus on community colleges who are seen as leading efforts in the adoption and expansion of online courses, programs, best practices and degrees.

Mega-trends

- Distance Learning enrollments have accounted for nearly all student enrollment growth at community colleges during the past twelve years.
- Distance Learning administrators have shifted from simply offering their students some online courses, to a concerted commitment to enhancing the overall quality and integrity of the college's online program. The need to improve online course and program quality has encouraged college DL administrators to offer professional development and training to faculty and staff, address the issue of student readiness, and improve student assessment, retention and completion rates.
- This year, eighty-three percent of respondents indicate that their online courses are equivalent or superior to traditional courses indicating that online learning has “caught up” to traditional education. As of 2010, online classes were deemed to be equivalent to traditional instruction, according to the US Department of Education
- During the past sixteen years, the direct report line for key distance learning personnel has shifted significantly from non-academic to academic administrators at the college. This has allowed distance learning staff to better support their faculty and obtain faculty buy-in. The new reporting structure aligns with a change many campuses have experienced with regard to eLearning—a shift from the technical aspects of using technology for instruction, to meeting the pedagogical and academic support needs for delivering instruction to students online.
- Distance educators have experienced dramatic—often traumatic—changes in the learning management system (LMS) market that have redefined the virtual learning environment. Colleges have replaced older systems with more sophisticated, user-friendly, cloud based LMS solutions. Distance educators see increased diversity in the number and variety of LMS options available and adoptions, but the market remains dominated by four key LMS solutions. As of 2020, a relative stability has been achieved; data indicates the lowest number of programs thinking of changing their LMS (lowest in the sixteen years of the survey) and programs give their LMS relatively high marks in satisfaction.
- Orientation/student readiness, assessing student learning and performance and providing adequate student services have invariably been in the mix since the launch of the ITC survey. Community colleges face special challenges due to their commitment to serving under-represented populations and students who are on the wrong side of the digital divide. There is also an absence of online learning at the K-12 level to help new students.

Major Trends

- Federal rules and regulation—with regard to student financial aid fraud, state authorization, student authentication and ADA compliance—command a greater degree of administrative attention and resources. Respondents indicate federal regulations are amongst their biggest

challenges in terms of cost and staffing. Political changes in Washington DC have had a significant impact on this issue going forward. The new focus on deregulation via the Negotiated Settlement (neg-reg) – and the possibility of a Higher Education re-authorization - have increased the focus on Washington DC. Changes in the regulation of Distance Learning will bring more for-profit competition back into the higher education market.

- Community colleges continue to embrace the full spectrum of online course applications and include fully online, blended, hybrid, Web-assisted, Web-enhanced, and Web-facilitated courses but overwhelmingly favor fully online classes. This distinguishes community colleges from universities where online education lives on the edges of the university (e.g. Independent Studies)
- Eighty percent of campuses require faculty members to take part in some type of training before they allow them to teach a class online. This is a significant improvement, but in 2020, nearly 20 percent of reporting campuses indicated they do not require any training for those who teach online classes.
- Greater awareness of Section 504 and 508 accessibility compliance requirements has been achieved, but most campuses lack the resources including a steering committee of stakeholders, an agreed-to campus wide plan, an agreed-to timetable and dedicated funding all of which are need to address these issues quickly and comprehensively and likely meet the “good-faith” standard of compliance
- Open Educational Resources (OER) are gaining attention – and momentum – on community college campuses. They are a perfect complement to online learning, and with the emergence of the “Z” Degree, the blending of free course materials and online degrees will be popular with traditional and nontraditional students alike. Further buy-in from educators will lead to further progress in the use of OERs in higher education.
- More colleges are out-sourcing the hosting of their campus learning management system (LMS) platform (normally a requirement of the LMS provider); this represents a major shift away from campus-based hosting which was common in the early days of online Distance Learning
- For the past eight years, community colleges have shown little interest in creating or incorporating MOOCs into their distance education programs. Although, the MOOC movement has generally subsided, some community colleges are using and/or creating MOOCs to provide student orientations, remedial coursework so students can get “up-to-speed” before they enter or return to college, and increasingly as a marketing tool to K-12 students and the community. However, MOOCs have little/no appeal for a method of offering instruction
- Most community colleges have identified resources to expand professional development, faculty training, and instructional design support. A growing number of administrators indicate they are

receiving greater institutional support while others continued to operate with no dedicated staffing and limited budgetary support – essentially a tale of two cities

- Increasingly more colleges are expanding the virtual and student support services they offer to online students to meet the “equivalency” standard regional accreditation agencies require of online programs, but the expansion is uneven. Many campuses report student dissatisfaction with the quality and availability of virtual student services
- A significant number of nontraditional students take Distance Learning courses—40 percent in 2020 — this matches the average percentage of nontraditional students enrolled in traditional courses. Online education appeals to nontraditional students who are working and appreciate a flexible educational environment.

IS YOUR DISTANCE LEARNING PROGRAM TYPICAL?

Distance education administrators always wonder how their program compares to those at other institutions. Is it typical or consistent with national trends? Highly successful individual programs do not always reflect these generalized characteristics—variances often result from the culture of the institution and the role the distance education program is expected to play. In 2020, after sixteen years of data collection and monitoring, for most of the survey participants, the typical Distance Learning program:

1. Is the institution’s primary source for student growth in enrollment
2. Offers approximately 607 online classes/class sections each term
3. Enhances access to higher education, due to its increased flexibility and convenience
4. Offers a mixture of fully online, web-assisted and blended or hybrid instruction but overwhelmingly favors fully online classes
5. Does not offer enough courses to meet student demand.
6. Has little or no control over course offerings, degree offerings, faculty recruitment, hiring, evaluation and retention
7. Reports to the academic side of the institution, and specifically to a dean or more highly ranked academic administrator
8. Acts as a change-agent at the institution, prompting increased faculty training and professional development, a rethinking of teaching pedagogy, and the integration of technology into instruction
9. Is increasingly viewed as more mainstream and experiences a greater degree of organizational acceptance than in the past
10. Often leads the institution in dealing with issues of innovative course design, rigor, course quality, data-driven course assessment, and keeping up with new insights as to how students learn.
11. Has experienced **some** improvement in the amount of office space, number of staff and budget support allocated
12. Is still under-staffed and lacks the resources to address course quality improvement, ADA compliance, adequate training, adequate related student services, and student success
13. Serves significant number of nontraditional (adult) students (40%)

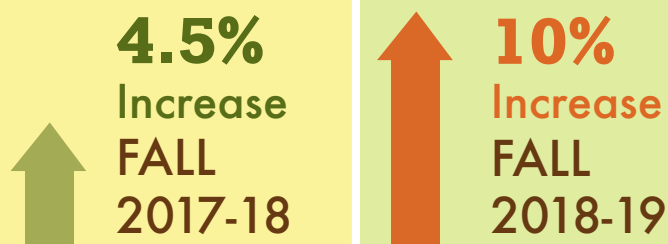
14. Deals with a growing number of state and federal government regulations
15. Has a majority of classes taught by full-time faculty (60-40 ratio)
16. Is currently not compliant with Section 504 and 508 ADA requirements – is beginning to make progress on the compliance issue -but needs greater engagement and support from campus senior administrators as well as a committee, a plan, a timetable and a dedicated budget for compliance
17. Is satisfied with its current Learning Management System
18. Is doing a better job at student retention
19. Deals with students that are not ready to take an online class
20. Is increasing the number and type of degrees offered online
21. Has specific student success strategies in place to improve retention and persistence
22. Is interested in expanding the use of Open Educational Resources (OER) in support of reduced textbook costs for students
23. Is viewed as matching the quality of traditional classes (83 percent)
24. Has greatly improved the quality of online course instruction through training and course development as well as the ability to hire specialists (Instructional Designer(s), Assistive Technician(s), Videographer(s). Also needs support from Student Services, the Library and the IT Department
25. Now represents, on average, 25 percent of your institution's FTE/enrollment

TYPICAL ONLINE FACULTY MEMBER

In 2020, the typical online faculty member:

1. Works full-time (60 percent of online classes taught by full-time faculty)
2. Works on campus and also teaches face-to-face classes.
3. Is recognized as a good to excellent educator in the virtual and face-to face classroom.
4. Has taught online classes for at least five years.
5. Volunteered to teach online.
6. Received at least eight hours of training before teaching online for the first time.
7. Is more willing to map course outcomes and fulfilling assessment expectations than a colleague who teaches face-to-face classes.
8. Is more committed to improving course quality.
9. Has a limited understanding of how to use technology, but is willing to learn how to use it
10. Perceives the value of learning to teach online as a professional development opportunity and as a way to better serve students.
11. Enjoys teaching online
12. Is showing greater interest in Open Educational Resources (OER)
13. Likely uses some type of proctored exam at least once during the term
14. Is highly resistant to changing the college Learning Management System (LMS)
15. Is more agreeable to efforts to adopt a course quality improvement strategy

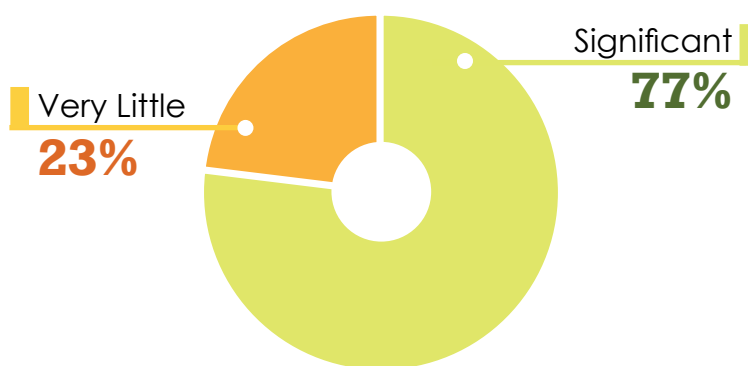
ONLINE ENROLLMENT



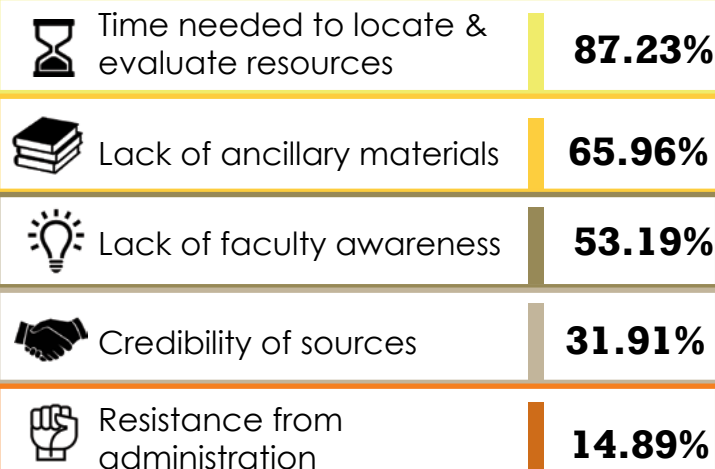
TOP 3 ADMINISTRATIVE CHALLENGES

ANTICIPATED 3-5 YEAR OER IMPACT

- 1 Engaging faculty in the development of pedagogy
- 2 Evaluation of faculty
- 3 Workload issues

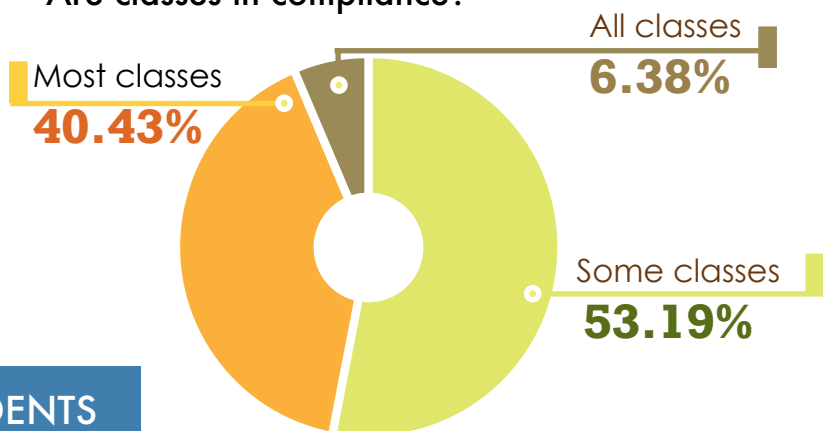


ROADBLOCKS TO OER ADOPTION



ADA ONLINE COURSE COMPLIANCE

Are classes in compliance?



TOP 3 CHALLENGES RELATED TO STUDENTS



- 1 Orientation/student readiness for taking online classes
- 2 Providing equivalent virtual student services
- 3 Assessing student learning & performance in online environment

TOP 3 GREATEST CHALLENGES RELATED TO FACULTY

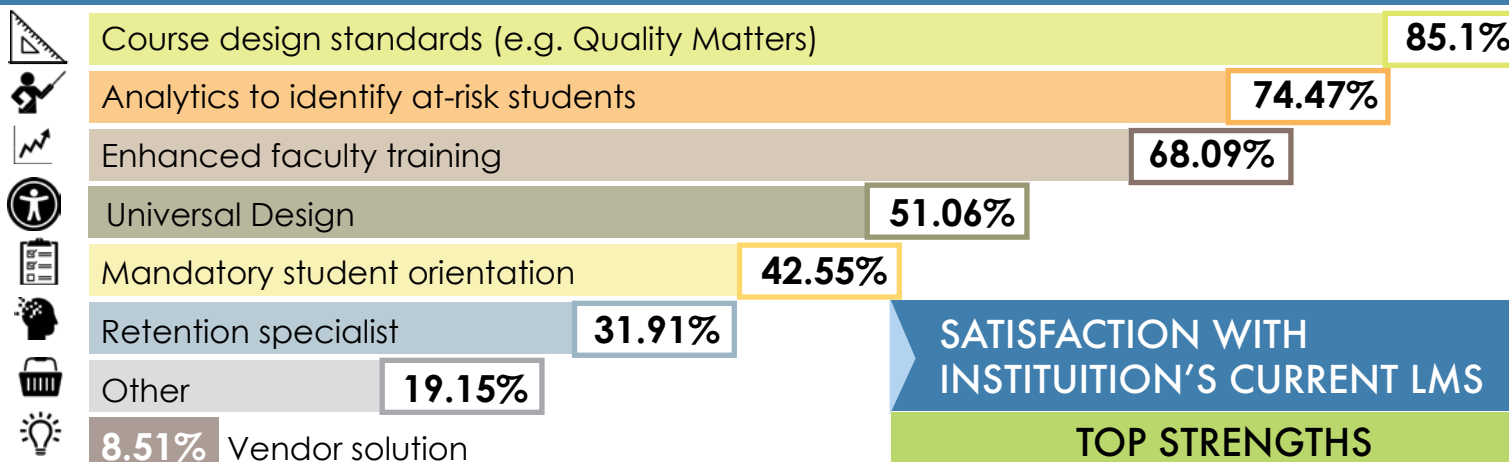
HOURS OF TRAINING REQUIRED FOR FACULTY TO TEACH ONLINE



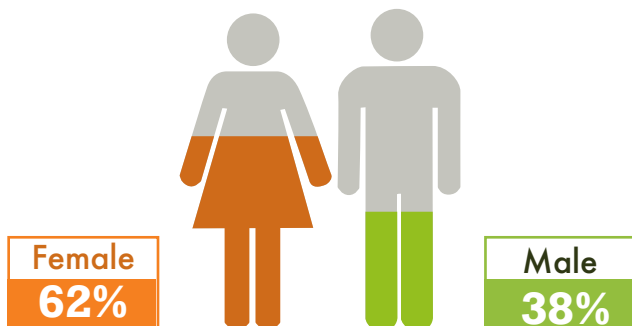
- 1** Course design standards (i.e. Quality Matters, homegrown, or other rubric) **85.1%**
- 2** Analytics to identify at-risk students **74.46%**
- 3** Enhanced faculty training **68.09%**

Hour	Initial	Recurring
0	17.02%	61.7%
1-2	4.26%	10.64%
3-4	8.51%	10.64%
5-6	6.38%	12.77%
7-8	6.38%	2.13%
9+	57.45%	2.13%

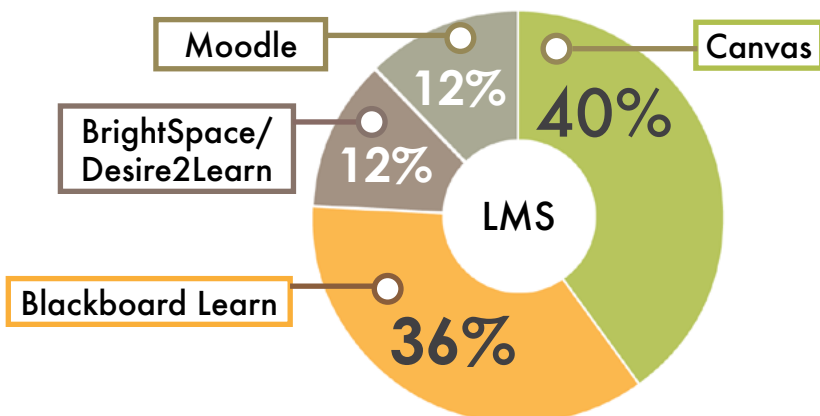
COLLEGE STRATEGIES TO IMPROVE ONLINE COMPLETION & STUDENT SUCCESS



ONLINE STUDENTS: GENDER



LMS ADOPTION



SATISFACTION WITH INSTITUTION'S CURRENT LMS

TOP STRENGTHS

- HOSTING
- RELIABILITY
- ACCESSIBILITY COMPLIANCE
- CLIENT COMMUNITY
- CUSTOMER SUPPORT
- EASE OF USE
- FEATURES / FUNCTIONALITY
- TRAINING RESOURCES

TOP WEAKNESSES

- ANALYTICS
- AFFORDABILITY

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ACKNOWLEDGEMENTS

The ITC board of directors has designed this annual survey to provide relevant data for distance learning practitioners. The eLearning landscape is constantly changing; administrators and faculty need data that is both contemporary and relevant. We recognize that eLearning is “new ground” for many senior college administrators who are often asked to support new staffing, space requirements and budget requests with a fixed or shrinking budget. College administrators want to ensure they make the right decisions that will benefit their students, faculty, staff and greater community, and make the most of limited resources. Hopefully, the survey provides concrete data that justifies greater support for the college’s eLearning program. The ITC distributes an e-copy of the ITC Survey Infographic to every community college president in the United States as well as an Executive Briefing on Significant Survey Findings. ITC also distributes the full survey report to its member institutions. Many Distance Learning administrators have told the ITC staff how much they value these results, but this effort would not be possible without the continued participation and support of our ITC members.

We wish to thank all of the ITC member institutions who participated in the 2020 survey project. Special appreciation goes to the ITC Board of Directors for their continued support of the project and for their efforts to refine the topic areas and help draft several new questions for each annual survey. A very special “thank you” to Travis Souza who has been an integral partner in this survey since the beginning. He provides outstanding technical support, creates the online survey instrument, produces the tabulated results and engages in active feedback each and every year. He is a strong voice for greater simplicity and clarity as well. And a “tip of the hat” to ITC Board members Loraine Schmidt and Martin Hoffman for their personal involvement each year.

Fred Lokken
Chair, ITC
&
Professor, Political Science
Truckee Meadows Community College
Reno, Nevada

ABOUT THE INSTRUCTIONAL TECHNOLOGY COUNCIL (ITC)

The Instructional Technology Council (ITC) is celebrating 42 years of providing exceptional leadership and professional development to its network of eLearning experts by advocating, collaborating, researching, and sharing exemplary, innovative practices and potential in learning technologies. An affiliated council of the American Association of Community Colleges since 1977, ITC represents higher education institutions in the United States and Canada that use distance learning technologies.

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

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