



Membership matters.

Navigating the Mainstream:
Changing Landscape of Online
Education (CHLOE) 4



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- Questions will be taken at the end of the webinar
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 - If we don't get to all of the questions, we'll follow-up afterwards via email





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Navigating the Mainstream:
Changing Landscape of Online
Education (CHLOE) 4





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Agenda

- Introduction to CHLOE 4 in Today's Environment
- What Do CHLOE 4 Results Tell Us About **Online Leadership and Policy**?
- What Do CHLOE 4 Results Suggest About **Online and Scale**?
- Concluding Remarks: Online Goals & Plans for CHLOE 5



Introduction to CHLOE 4 in Today's Environment



Growth in CHLOE Survey Participation

Year	Public 2Y	Public 4Y	Private 4Y	For-Profit	TOTAL
CHLOE 3	76	91	98	11	280*
CHLOE 4	99	135	123	8	367*
% Increase CHLOE 4 vs. CHLOE 3	30%	48%	26%	-27%	31%

* Including a handful of other institutional types



Statistical reliability: margin of error of 5% at 95% confidence.

Growth in CHLOE Survey Participation

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Less than 1,000 online students	34%	125
1,000 – 7,500 online students	54%	198
More than 7,500 online students	9%	33



Multi-factor Institutional Models

Enterprise – 4-year public, private nonprofit, and for-profit institutions with more than 7,500 fully and partly online students

Flagship – **NEW** - The leading 4-year public universities, with research and public service roles, as designated by their home states and recognized by the Association of American Universities, with fewer than 7,500 fully and partly online students. The CHLOE 4 Survey included 20 out of 60 flagship school in the U.S. – 33%.



Regional Public – 4-year public institutions (excluding state flagships) with between 1,000 and 7,500 fully and partly online students

Regional Private – 4-year private nonprofits with between 1,000 and 7,500 fully and partly online students

Low Enrollment – 4-year public and private nonprofits with fewer than 1,000 fully and partly online students

Community College – 2-year public institutions with fewer than 7,500 fully and partly online students

Do CHLOE Findings Shed Light on Higher Education's Response to the COVID-19 Pandemic?

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- CHLOE has explored how well online learning is establishing itself alongside face-to-face learning
- CHLOE has focused on a glass half full, but COVID-19 forces us to consider the consequences of a glass half empty
 - CHLOE has **not** explored the degree to which online learning capabilities have penetrated the **non-participating** segment of the faculty and student body
- In this webinar will attempt to address the empty portion of the glass: How ready is online learning to assume responsibility for *all* learning – temporarily or permanently?



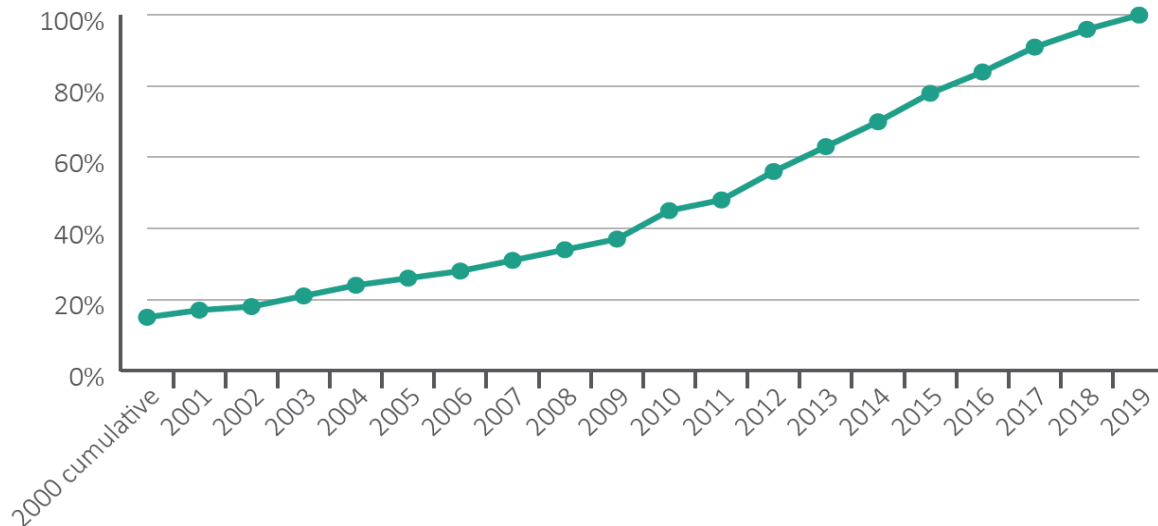
Role of Chief Online Officer, OPMs, Training & Orientation

What Do CHLOE 4 Results Tell Us About Online Leadership and Policy?



Is Someone in Charge of Online Learning?

Chief Online Officers (COO) in CHLOE Sample

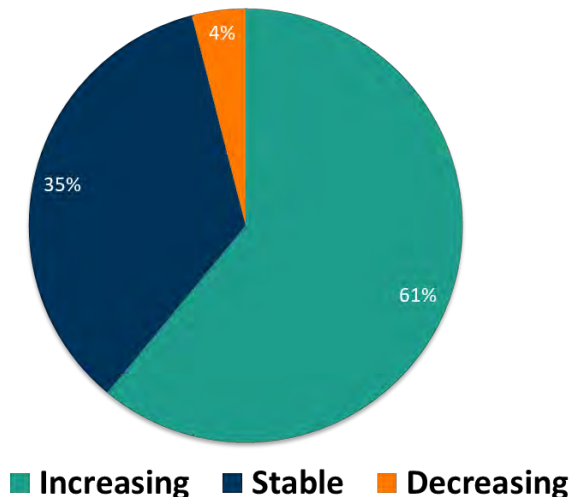


Who Do You Call? COO Core and Co-Responsibilities

49% or More COOs Report Each of These Responsibilities

COO Core Responsibilities	COO Co-Responsibilities
Faculty training	Selection of LMS and online tools
Instructional design	Online support services
Quality assurance	Regulatory compliance
Online policies	Contracting with external providers
LMS support and administration	Data gathering and reporting
Course development	Online technical support
Coordination with academic units	Online program development
External representation	Intellectual property protection
Budgeting of online	Market research
Student orientation	Accessibility issues
Strategic planning	On-campus technology
	Open educational resources support
	Marketing of online programs

Growing Influence of COOs



80-85% of COOs report to an Academic Affairs officer

61% of COOs in our sample have a collaborative peer-to-peer relationship with the CIO

How might coronavirus affect the influence of the COO position?

Online Program Management (OPM) Partnerships

OPMs Can Help Some Institutions Make a Rapid Transition to Online Learning

- Half of OPM users cite these advantages:
 - OPMs can provide rapid scaling (49%)
 - OPMs enable rapid development (48%)
- Heaviest users – Flagships and Regional Privates
 - Institutions that typically have more discretionary resources

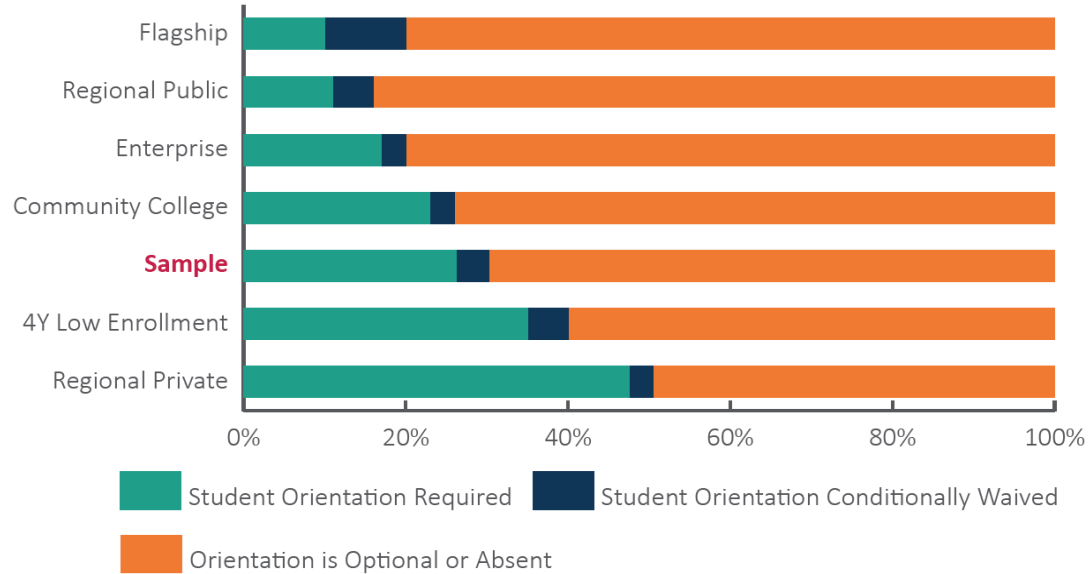
But Many Will Not or Cannot Rely on External Assistance

- **Community Colleges, 4-year low online enrollment and regional public institutions** are least frequent OPM users
 - More limited or absent discretionary resources
- **Frequently cited reasons:**
 - Assert they can meet their needs internally
 - Concerned about costs
 - Concerned about revenue sharing
 - Preference for short-term limited contracts

Only 30% of Schools Require Online Student Orientation

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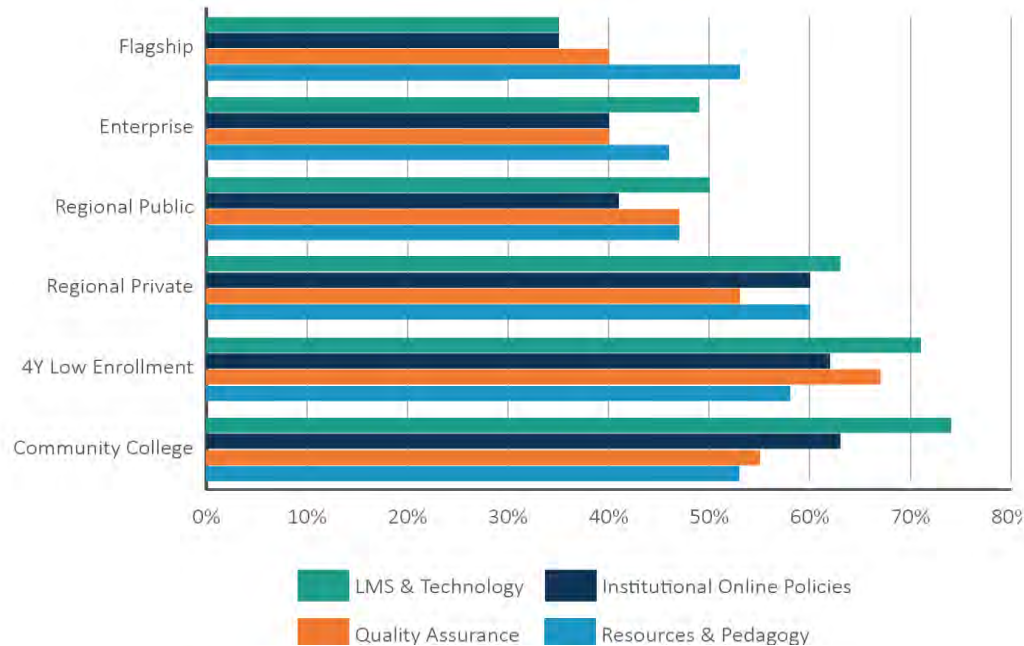
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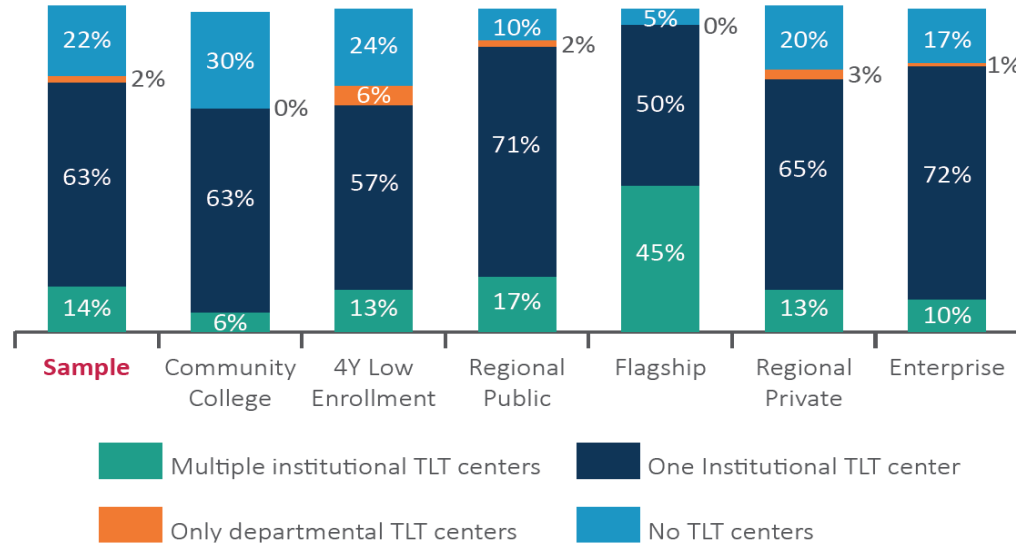
60% Require Faculty Preparation for Online Teaching

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How Much Do Teaching, Learning, & Technology Centers Contribute to Faculty Readiness?



Faculty Input to Online Policies & Priorities

Online Learning Council/Committee Functions	Determinative	Advisory	Not Involved
Online Course Development Policy	20%	72%	7%
Online Quality Assurance Policy	18%	72%	9%
Online Faculty Training Policy	17%	75%	8%
Online Student Policies	13%	74%	13%
Coordination among Academic Units	11%	67%	23%
Orientation Policy for Online Students	9%	70%	21%
Selection of LMS and Online Tools	9%	73%	18%
Online Program Development Priority	8%	62%	30%
Online Support Services Coordination	8%	68%	24%
Strategic Planning	8%	72%	20%

Price, Cost & Online Course Design

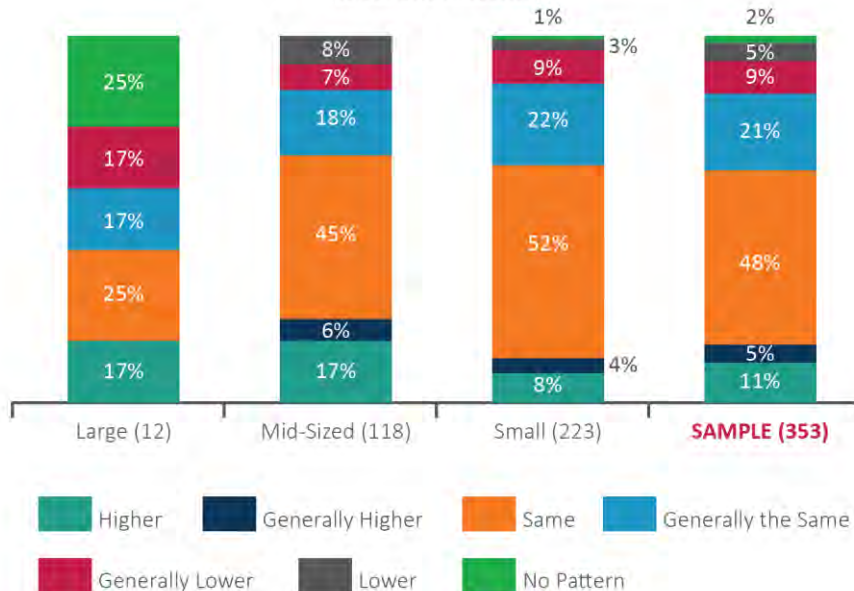
What Do CHLOE 4 Results Suggest About Online and Scale?



Online Pricing: The Pandemic will Test Assumptions

Figure 21: Online Tuition Compared to On-Ground Tuition

(Select One Response)

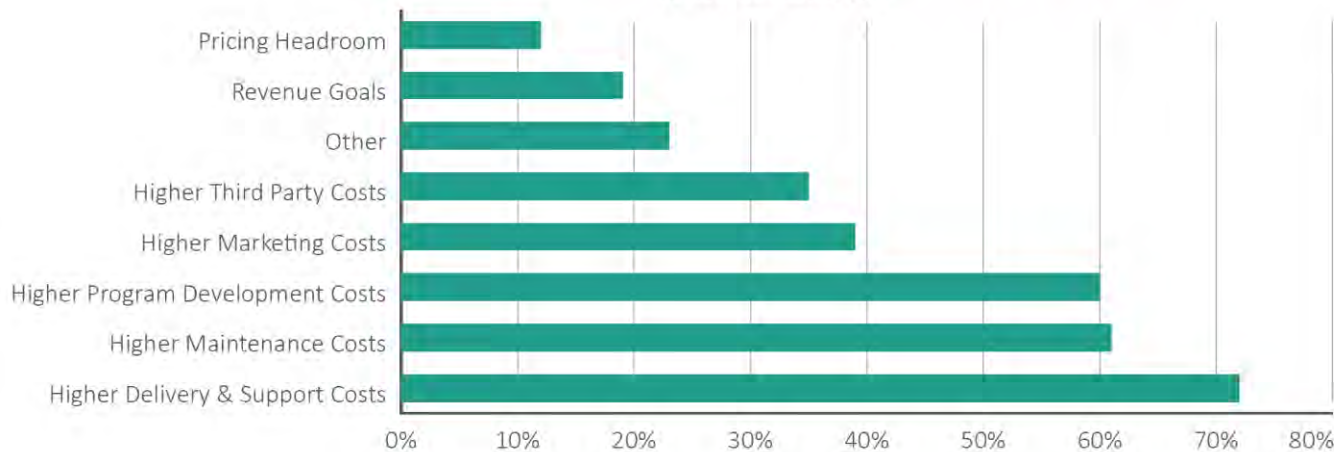


Pricing Logic: Online Really Does Cost More?

Figure 22: Premium Online Pricing Driven by Higher Costs

You answered "higher than conventional tuition." What justifies the policy?

(Select all that apply.)

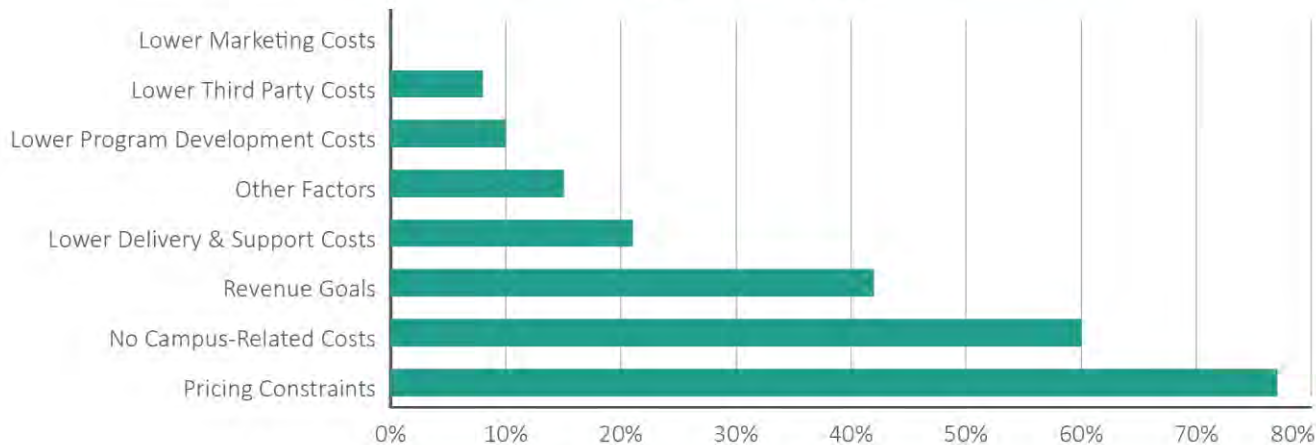


Pricing Logic: Online Really Does Cost More?

Figure 23: Lower Online Pricing Driven by Lower Costs and Market Constraints

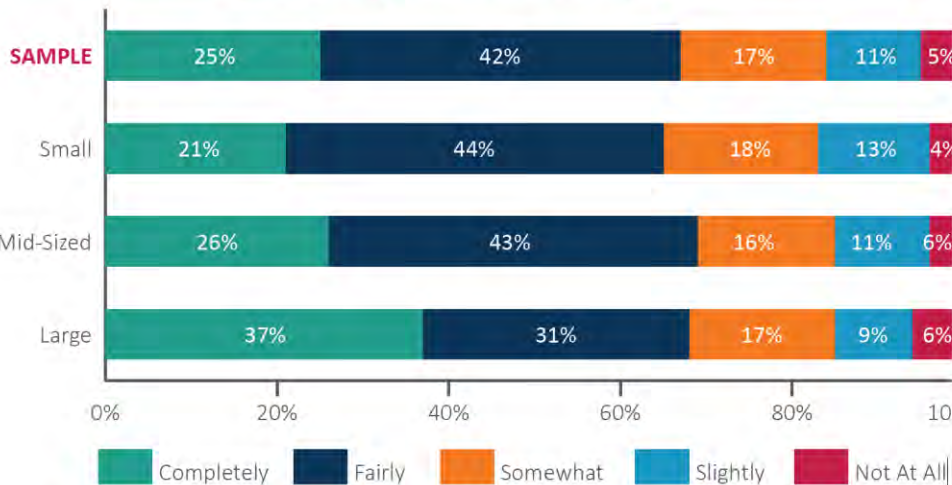
You answered "lower than conventional tuition." What justifies the policy?

(Select all that apply.)



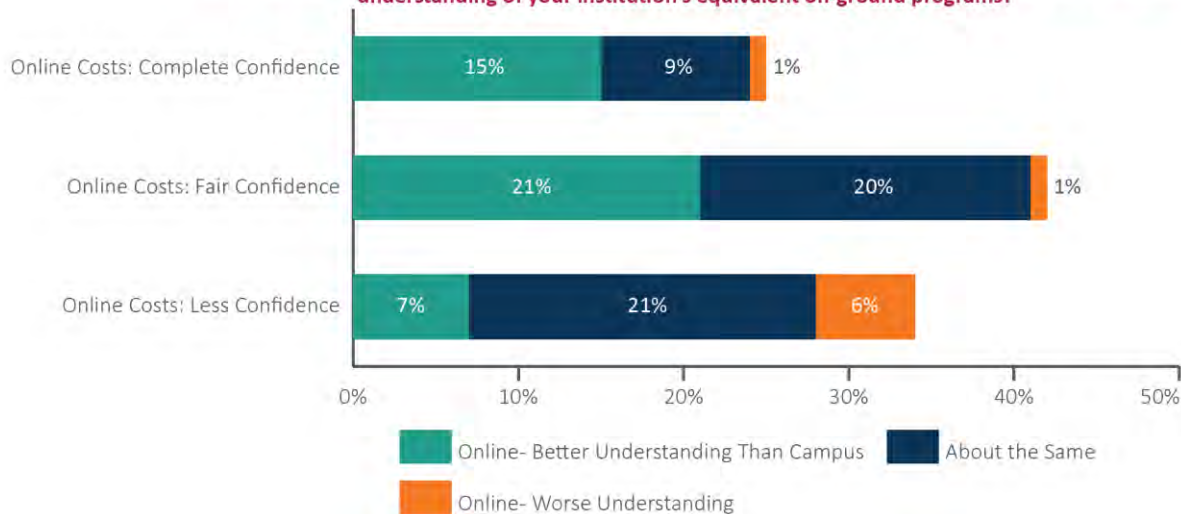
Cost Understanding: Will New Revenue Pressures Demand Clarity?

Describe your level of confidence in understanding the cost details of developing, delivering, and maintaining your institution's online programs.



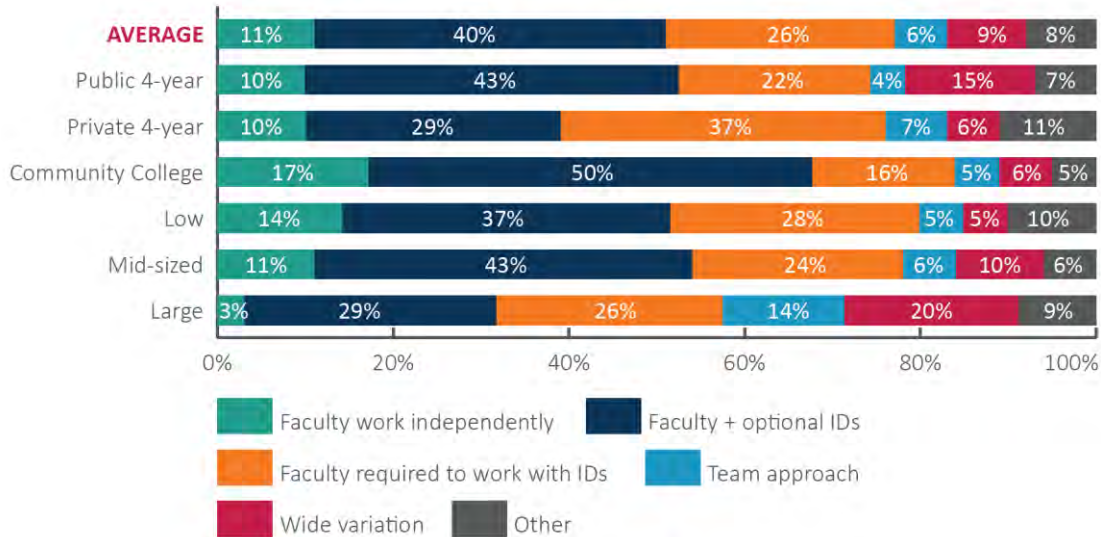
Cost Understanding: Will New Revenue Pressures Demand Clarity?

How does your understanding of the cost details of your institution's online programs compare to your understanding of your institution's equivalent on-ground programs?



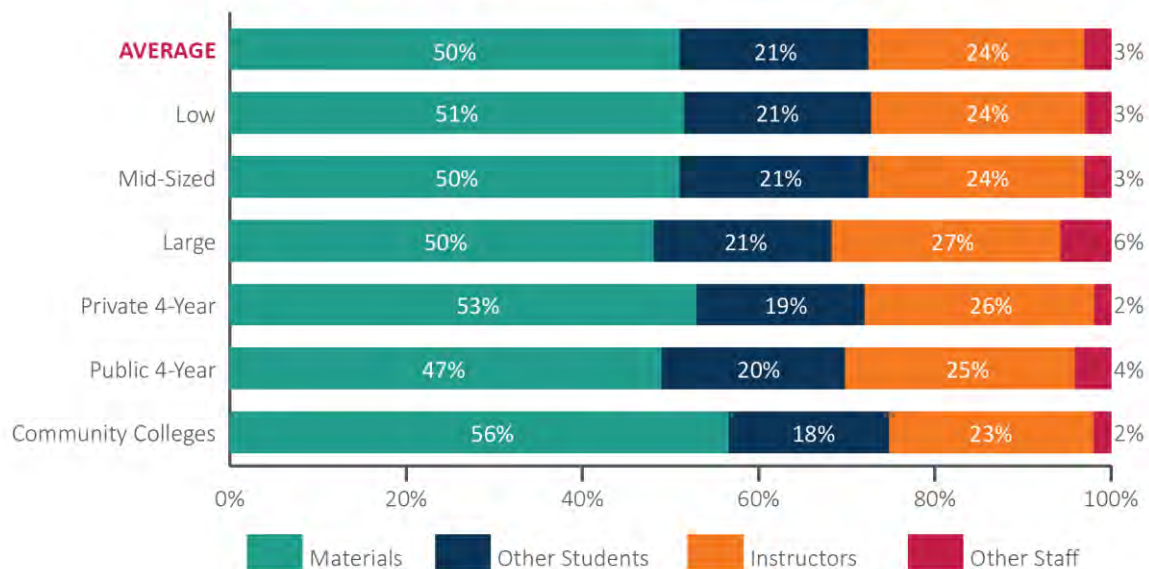
Online Course Development: Right Model for True Scale?

What is the primary or dominant online course development model at your institution?



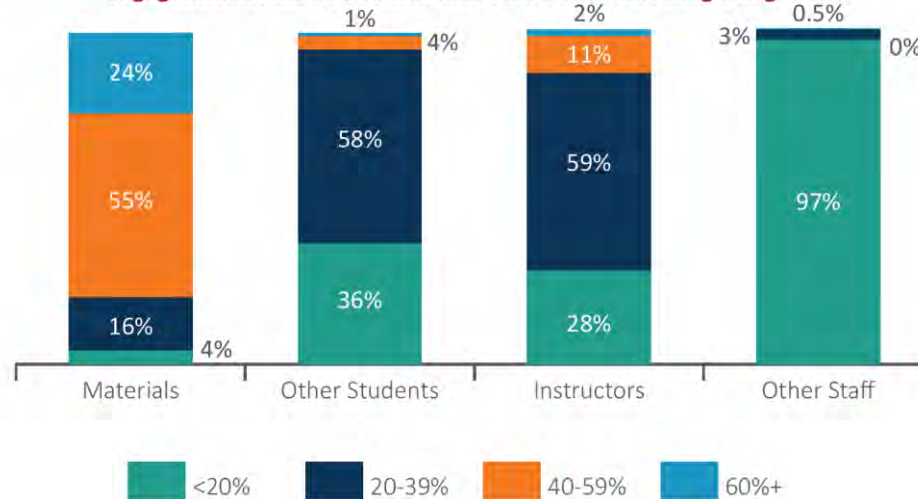
What is an Online Course? What is Remote Instruction?

In a typical online course offered by your institution, approximately what proportion (%) of student engagement in the course falls into each of the following categories?

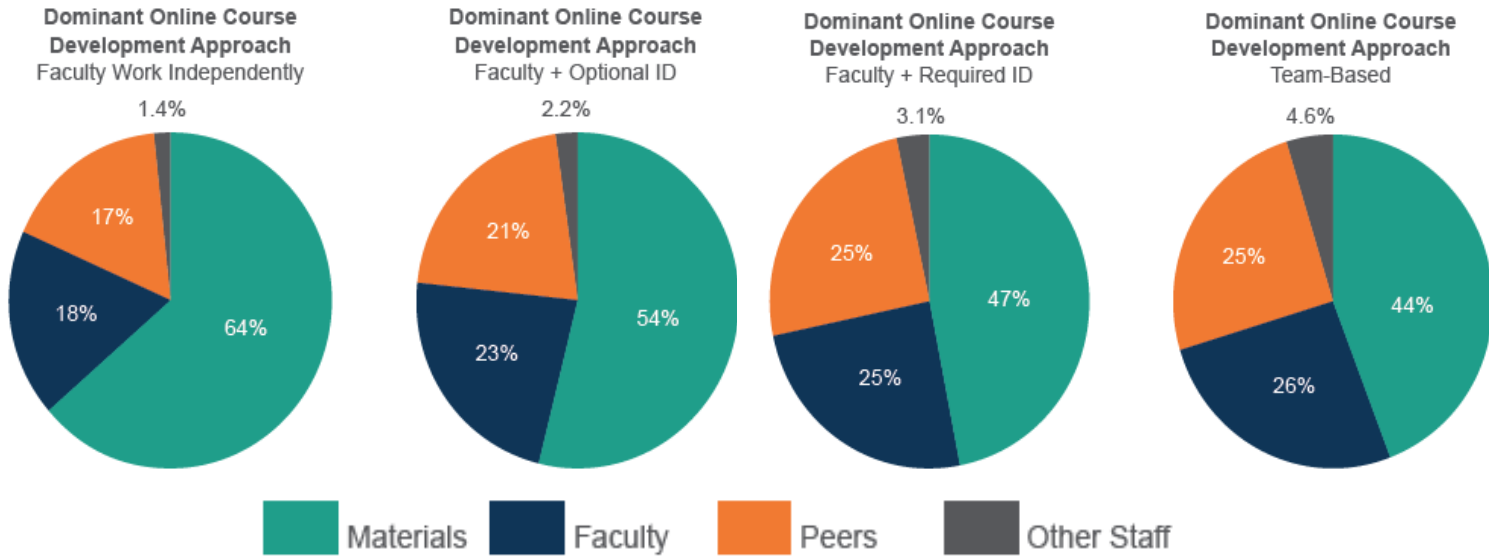


What is an Online Course? What is Remote Instruction?

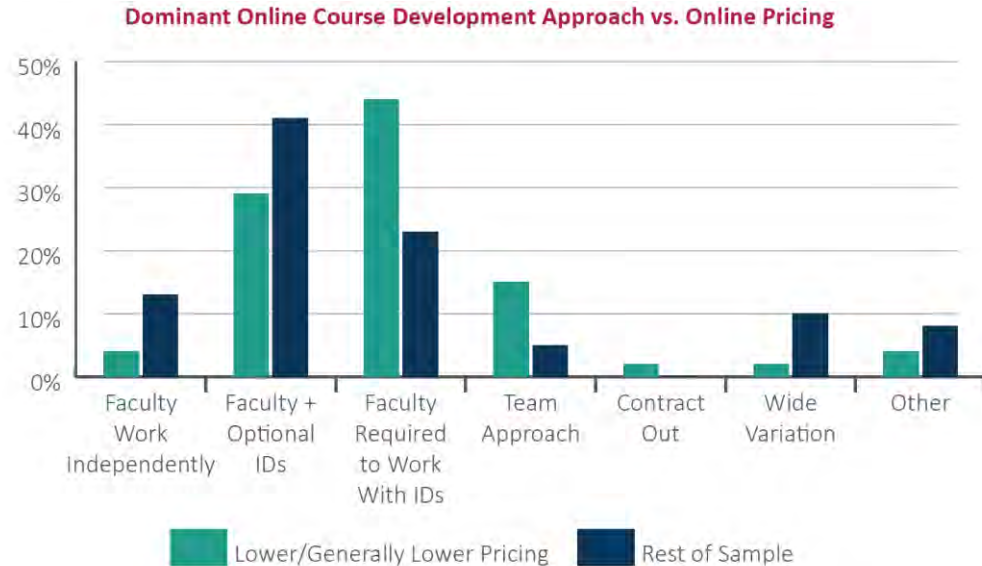
In a typical online course offered by your institution, approximately what proportion (%) of student engagement in the course falls into each of the following categories?



Reminder from CHLOE 3: Design Means Better Courses?



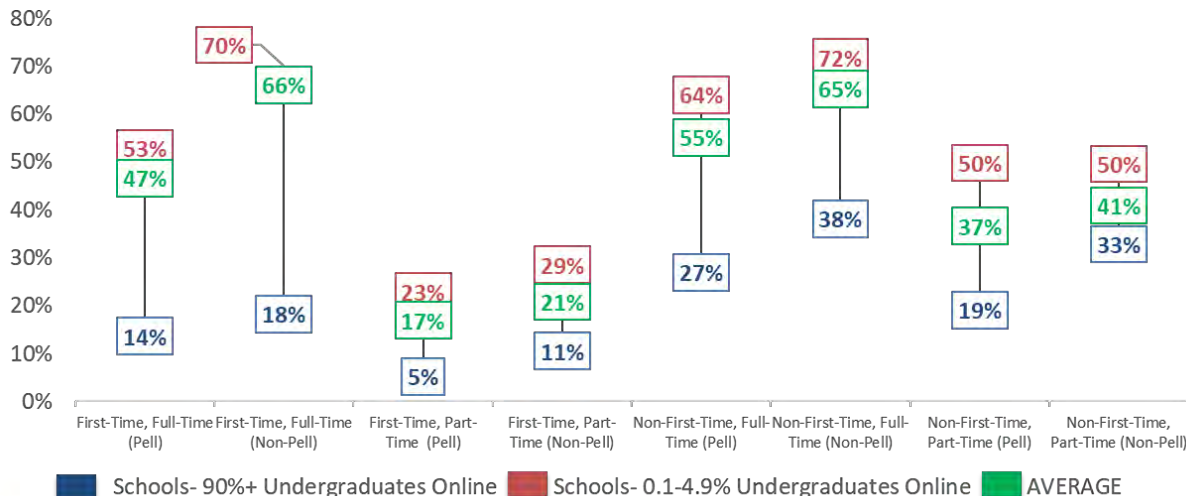
Coherent and Consistent Design Drives Cost Understanding



Less Traditional Students More Likely to Struggle Online

How to Mitigate for Fall 2020?

Undergraduate Credential Outcomes 8 Years Post-Enrollment
(Fall 2010 entry)- Delivery Mode



Concluding Remarks

Online Goals & Plans for CHLOE 5

Top Five-Year Online Program Goals

Top 5-Year Online Program Goals

Improve online quality (27%)

Improve overall program quality (47%)

Improve online course quality (39%)

Meet external quality standards (13%)

Improve the student learning experience (8%)

Achieve consistency across the curriculum (8%)

Increase online enrollment (24%)

Add online courses and programs (22%)



Will Coronavirus Disrupt Top 5-Year Goals?

Top 5-Year Online Program Goals	Coronavirus Impact
Improve online quality (27%)	NO
Improve overall program quality (47%)	NEGATIVE
Improve online course quality (39%)	NEGATIVE
Meet external quality standards (13%)	NEGATIVE
Improve the student learning experience (8%)	DOUBTFUL
Achieve consistency across the curriculum (8%)	DOUBTFUL
Increase online enrollment (24%)	YES – BUT TEMPORARILY
Add online courses and programs (22%)	YES – BUT OF VARIABLE QUALITY

CHLOE 5 – Looking Ahead

- COVID-19 Upends CHLOE 5 Plans
 - The Online Market Survey postponed
- Focus shifts to assessment of online learning's readiness to assume the entire instructional burden
 - Brief survey focused on scale and scope of the challenge
 - Re-analysis of CHLOE 1-4 findings on relevant resources
 - Mid-Summer CHLOE 5 Report on the challenges ahead





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Questions & Answers



Announcements

Webinar on Demand

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Eduventures[®] Research Webinar

Effects of COVID-19 on High School Students & College Choice



Presenters:

Kim Reid

Eduventures Principal Analyst at ACT | NRCCUA

This webinar is based on an Eduventures survey conducted in late March that garnered more than 6,000 responses from high school seniors nationwide. We discuss these findings and the impact that COVID-19 is having on their current high school experience and their ongoing college choice.

Our analysis frames the conversation of how colleges can move forward in helping students make sense of college choice in an uncertain time. We explore key segments such as first-generation and low-income students and students in hard hit regions of the country.

Questions & Answers





Thank you.

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