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E-Learning: A National, International (and Regional) Perspective

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The E-Learning Train Has Left the Station…

- Growth in all sectors
- Increasing demand by students, both on and off-campus
  - Convenience
  - Fits different learning styles
- New generation of tech-savvy students who
  - Are at ease with technology use
  - Have learned using technology
  - Are active and not passive learners
 - Are in a hurry…

The Challenge in the U.S.

- Over the last generation we've moved from 1st in educational attainment to 12th
- Overall education attainment is projected to decrease -- led to calls for degree "push" by
  - President
  - Major Foundations
- Billions of dollars (federal/state) are spent on activity that never leads to a credential
- Worse: millions of students are trying, but experiencing significant failures that put their futures (and ours) at risk
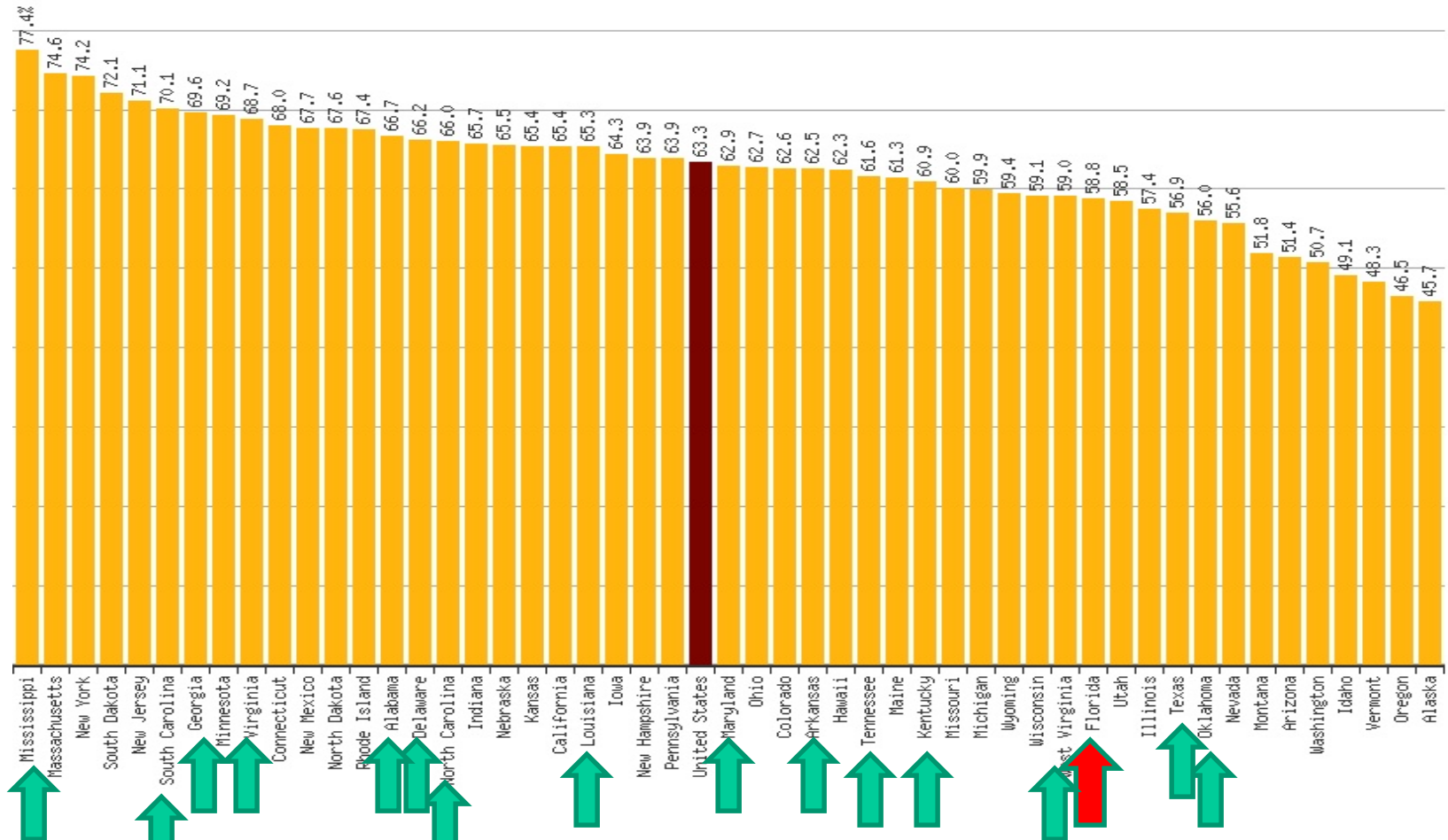
Percent of Adults with an Associate Degree or Higher by Age Group—Top Countries and the United States
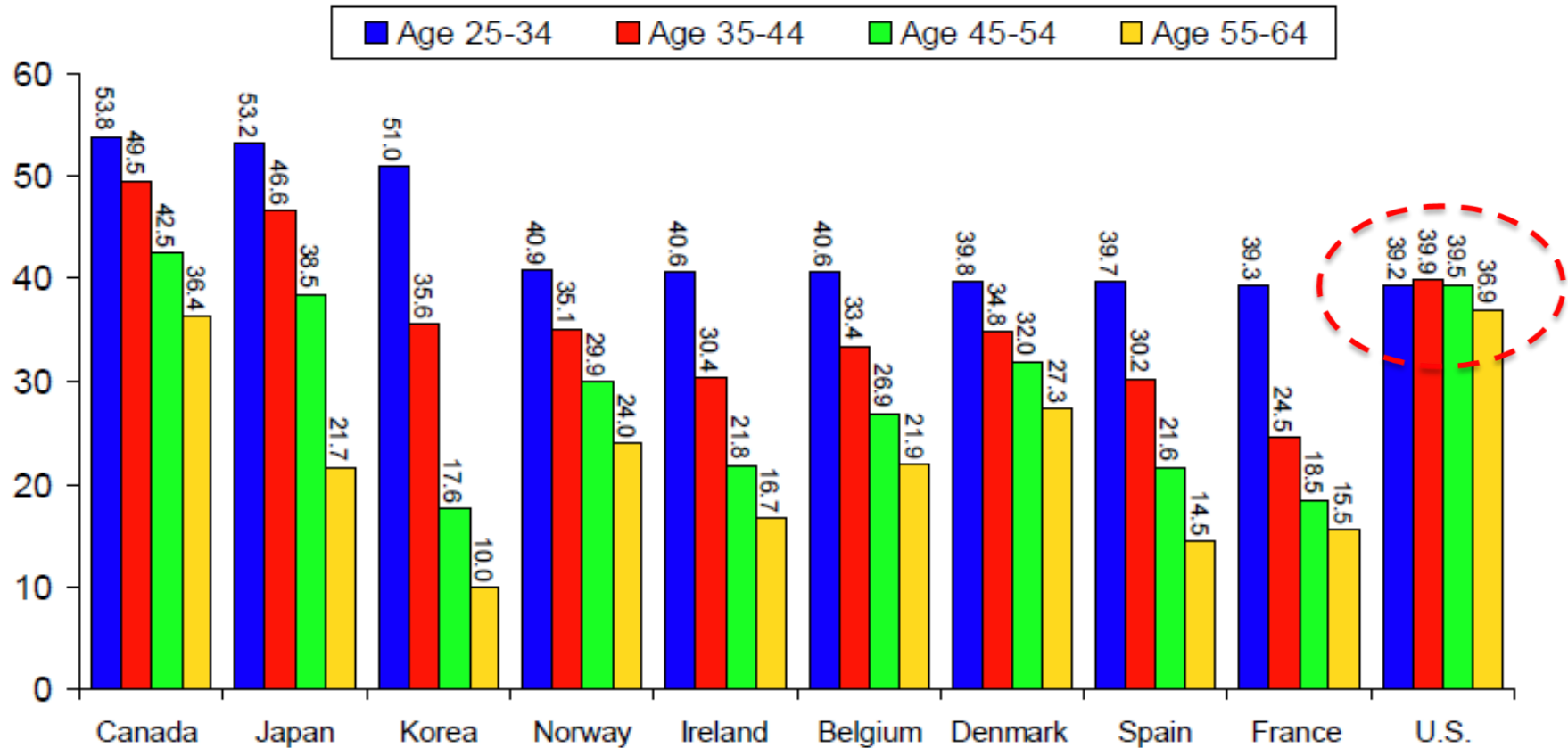
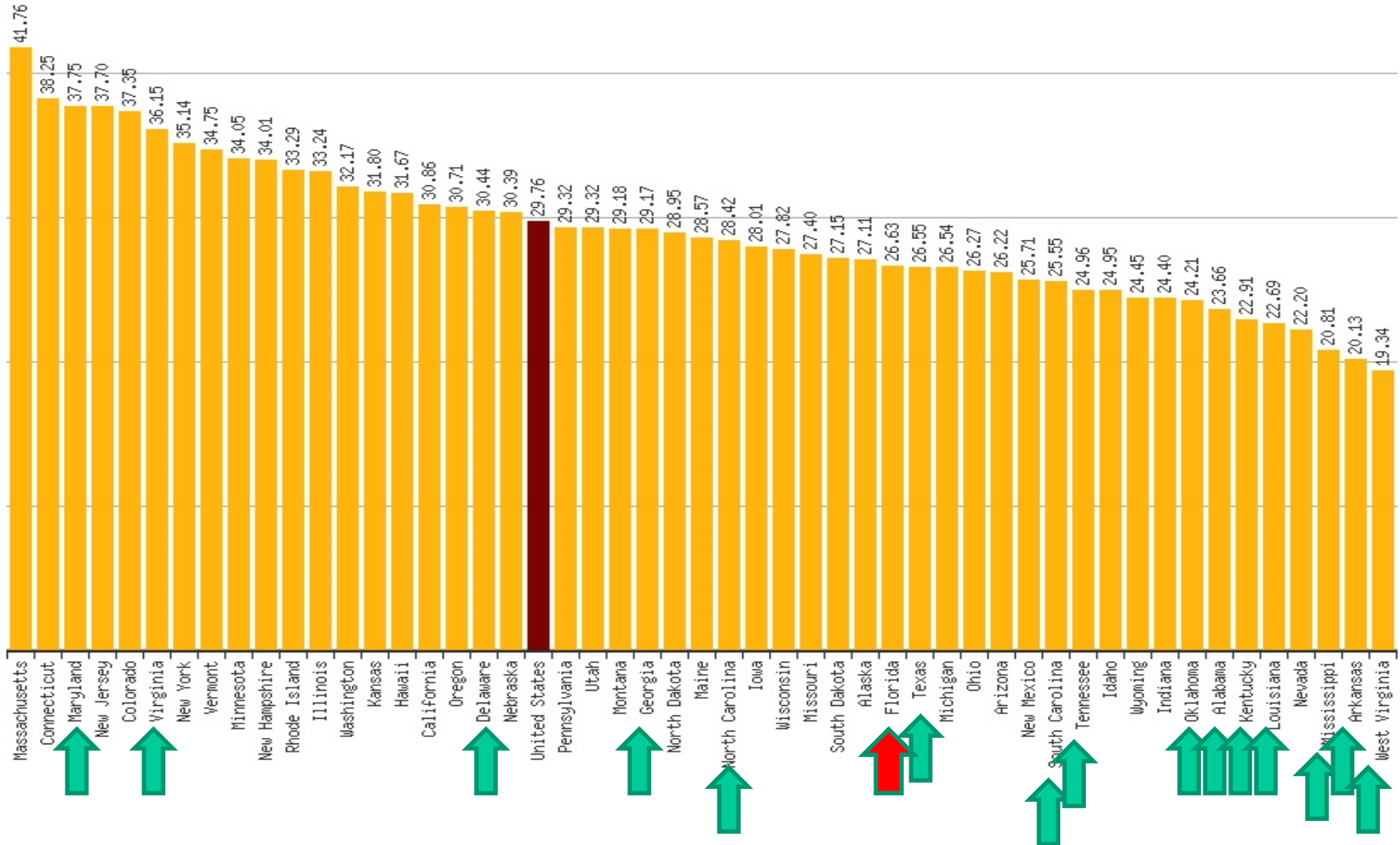Source: OECD, *Education at a Glance 2009*

College-Going Rates—First-Time Freshmen Directly Out of High School as a Percent of Recent High School Graduates, 2008
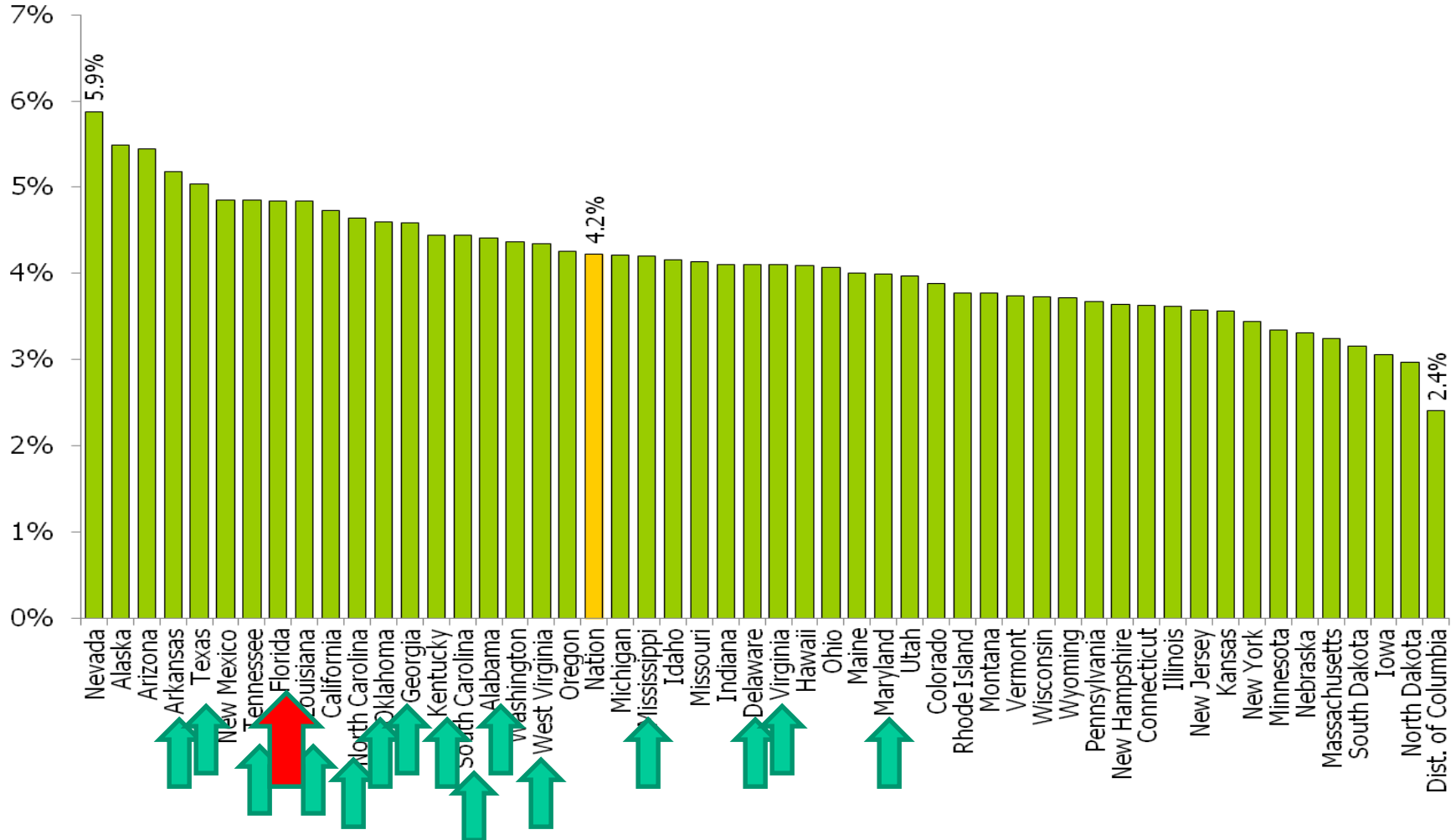

Source: Tom Mortenson, Postsecondary Opportunity

Adults with Bachelor's Degrees and Higher
25-64 Year Olds 2008

Source: U.S. Census Bureau, 2009 American Community Survey Public Use Microdata Sample File..

Contributing to the Goal: Average Annual % Increase in Degree Production Needed

The Challenge in Florida

- Projected changes in elementary and secondary enrollments (22% increase by 2017)
- Current and projected Florida high school graduates college enrollment rates are increasing
- Continuing enrollment increases in Florida's public four year institutions
- Expected increases in demand (see first bullet)
- Large number of working-aged adults without a degree (and new efforts to serve them)

A Perfect Storm…

SREB States FTE Enrollment Four Year Institutions

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Full-Time-Equivalent Enrollment, 2008-09 and 2009-10
(number change shown in parentheses)

State	2009-10
Texas (9,229)	431,903
Florida (5,740)	275,269
Georgia (9,278)	198,206
North Carolina (6,016)	193,719
Virginia (9,379)	189,580
Alabama (4,663)	127,743
Louisiana (4,008)	123,142
Tennessee (3,297)	116,828
Maryland (3,170)	99,949
Kentucky (1,188)	98,711
South Carolina (2,831)	89,362
Oklahoma (1,881)	87,873
Arkansas (1,571)	73,298
Mississippi (1,974)	61,954
West Virginia (1,147)	56,964
Delaware (261)	22,663

☐ 2008-09   ■ 2009-10

Source: SREB State Data Exchange, 2009-2010 Indicators Report

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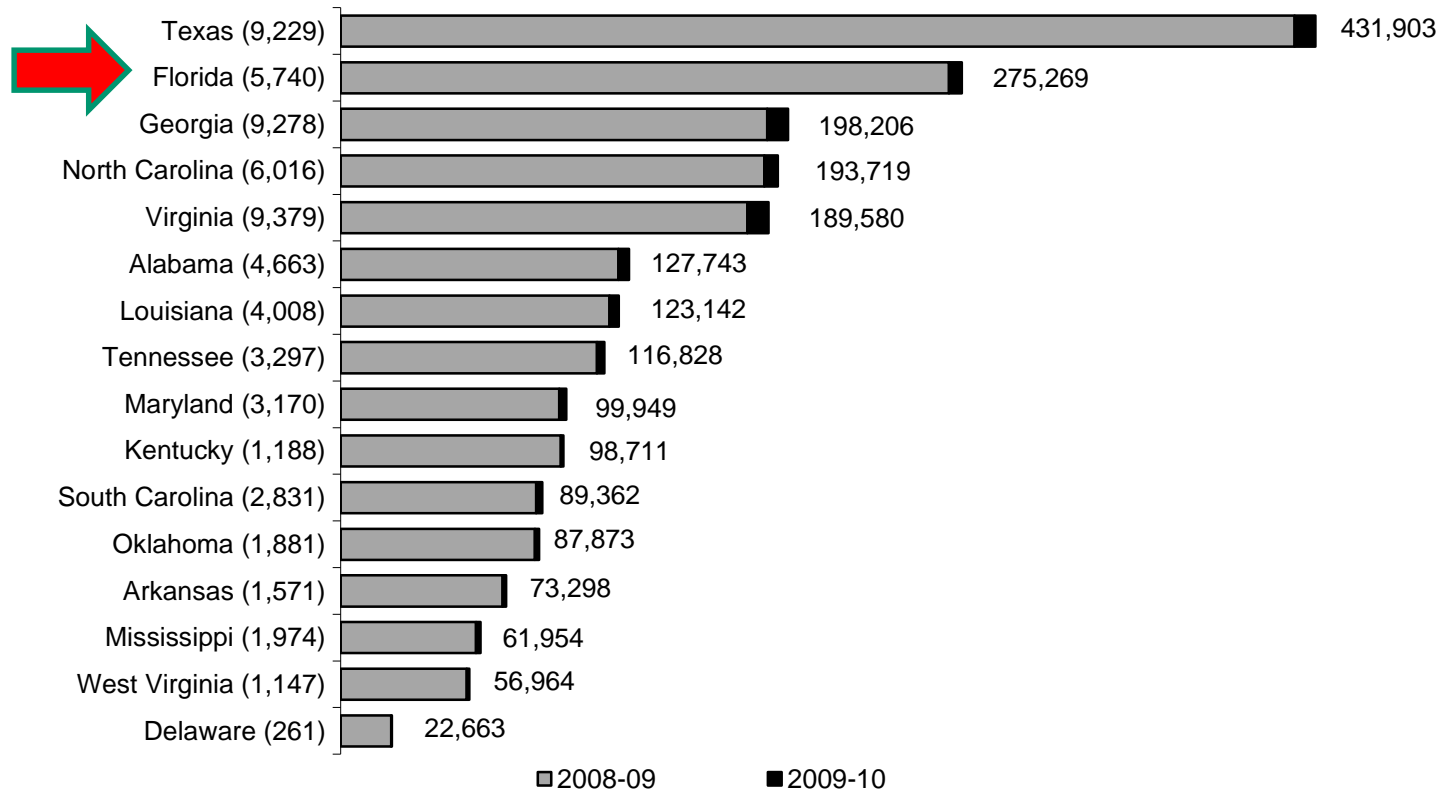
SREB States E-Learning Four Year Institutions

Percent of Undergraduate Instruction Through e-Learning, 2009-10
(point change from 2008-09 shown in parentheses)
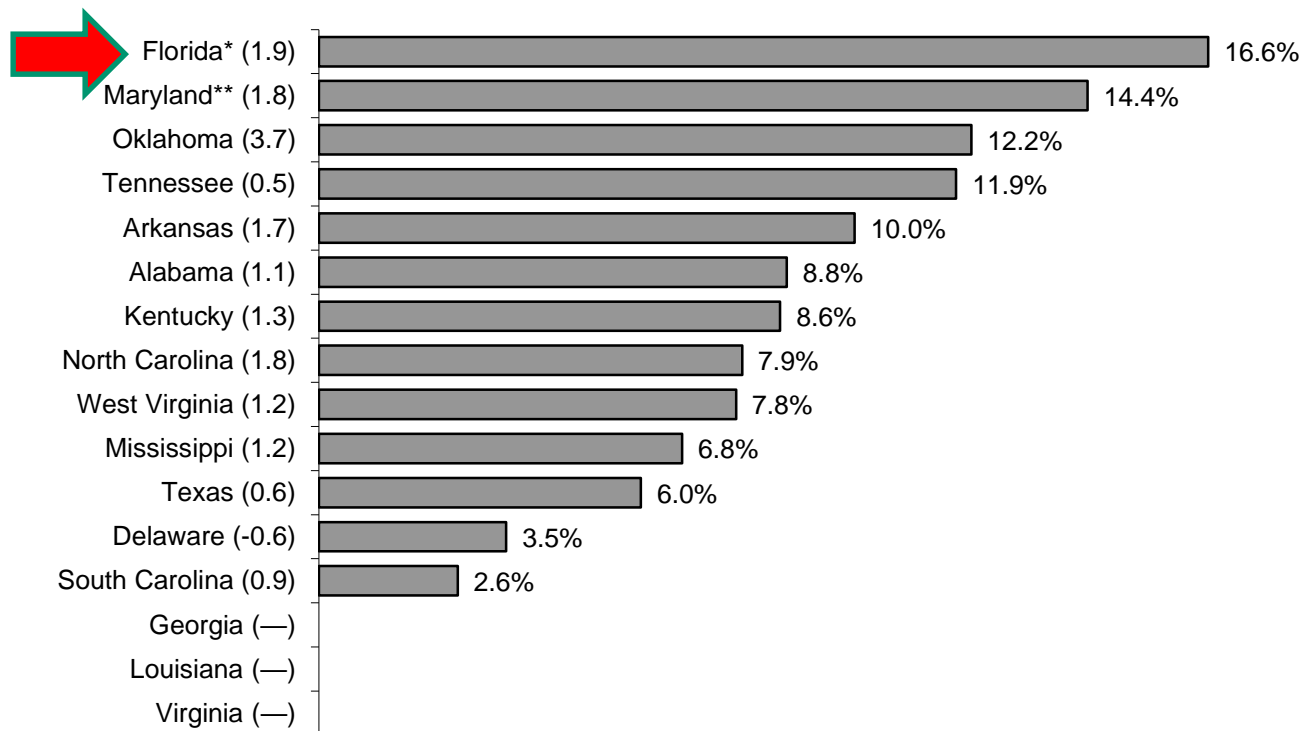
- Florida* (1.9) — 16.6%
- Maryland** (1.8) — 14.4%
- Oklahoma (3.7) — 12.2%
- Tennessee (0.5) — 11.9%
- Arkansas (1.7) — 10.0%
- Alabama (1.1) — 8.8%
- Kentucky (1.3) — 8.6%
- North Carolina (1.8) — 7.9%
- West Virginia (1.2) — 7.8%
- Mississippi (1.2) — 6.8%
- Texas (0.6) — 6.0%
- Delaware (-0.6) — 3.5%
- South Carolina (0.9) — 2.6%
- Georgia (—)
- Louisiana (—)
- Virginia (—)

Source: SREB State Data Exchange, 2009-2010 Indicators Report

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E-Learning to the Rescue?
(It's Already Happening in Florida!)

FL Undergraduate credits by Four Year Institutions

- Student credit hours increased by 150,100

- Traditional on-campus increased by 26,600

- Traditional off-campus decreased by 27,300

- **Florida's entire FTE increase over the past year came from E-Learning**

  - 104,300 Web-based

  - 22,300 site-to-site

  - 24,300 other

Why E-Learning?

- More flexible programs that meet student needs
  - Time, Location, Length, Delivery Formats
- Increasing number of faculty who utilize technology to create better learning environments
- High quality services that have been moved online (and available for all students)
- Preparation for the world of work
- Provides opportunities for true life-long learning
- Reach new markets of students (and former students)
- Can expand the reach of institutions, even to campus-based students

National/State Policy Issues Degree Attainment Challenge

- Given new national goals, U.S. competitiveness and degree "gap"…

- Given the percentage increases each state needs for national goals…

- Given the time it will take to reach these percentage increases with traditional-aged students…and

- Given the changing demographics…

- New opportunities, and increasing pressures, on online learning

Emerging Policy Issues Accountability

- Greater pressure to produce graduates (or completers)

  - Our rates of completion are difficult to defend

  - 40 million working age adults with some college and no degree (adding nearly one million a year to that total)

  - Funding changes that focus on rewarding completion

  - Challenges for the for-profit sector likely to be applied to the non-profit sector

  - Online programming can reach and serve many

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Emerging Policy Issues Tuition/Pricing

- Every indication that tuition and fees will continue to rise

- Seeing some interesting tuition strategies in online learning

  - Increasing rates and fees for Technology and "Convenience" fees for online learners

    - Revenue replacement for fees paid by on-campus students

  - "Market pricing"

    - Movement away from in-state/out-of-state tuition policy in the public sector?

Emerging Policy Issues Quality

- Questions linger about the quality of e-learning experiences, yet…

- We have more data on online learning than on traditional classroom activities

  - When students engage

  - How often they engage

  - What they are actually doing

- Re-focusing attention on

  - Outcomes

  - Time-to-degree

  - Address the "seat-in-a-seat" model

Emerging Policy Issues
Policy "Potpourri"

- Outsourcing

- Requirements for traditional students to complete some portion of their program online

- New competitors in the marketplace

  - For-profits

  - International institutions

- Emergence (re-emergence) of state regulatory efforts for online programming across state lines

- Prior Learning Assessment

  - Outcomes-based degrees?

An SREB Focus on Degrees

- Full Court Press on Degree Completion as Outlined in "No Time to Waste"
- Focus
  - Better job of preparation for college
  - Once in college, get students to a credential
  - If they drop out, get them back in at some point
- Growing awareness of our poor degree completion results by state legislatures suggests new accountability on success (and not just access) tied to funding

New Federal Regulations
SREB's Stance and Actions

- Since inception of *Electronic Campus*, we have operated in a "free trade zone"
  - Home state "sign-off" of programs recognized by other SREB states
- Consortial or reciprocity agreements allowable under the new regs
  - Seeking clarification from feds as to our continuing use to meet new regs
- Broader campaign to repeal, amend or delay implementation
- Stay tuned…

Thank You…

**sreb.org
electroniccampus.org
soon…
TheAdultLearner.org**

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