Feasibility Study: Distance Learning Enrollments In Independent Institutions

December 1999

EXECUTIVE SUMMARY

BACKGROUND

In 1999 the Legislature approved budget language (ESSB 5180) that directed the Higher Education Coordinating Board (HECB) to study the feasibility of collecting Washington enrollment data on distance learning programs sponsored by private institutions in Washington and institutions outside of the state.

The budget proviso was developed in the context of profound changes created by the growth and impact of distance education. The speed of Internet and e-commerce development has made it possible for in-state independent providers and out-of-state public institutions to serve Washington's citizens. Non-traditional entities such as publishers, software companies, and industry-based corporate trainers are forming new partnerships to take advantage of this "addressable market opportunity." Also, the elements of student services and instructional production are increasingly becoming separated and recombined, complicating efforts to monitor the field.

Data collection in this new environment will require new methods and standards, especially where learners receive their education from several providers at once. Issues affecting the feasibility of collecting distance learning data include: varied definitions of Distance Education, rapid growth and change in the nature, numbers and types of providers, specification of enrollment data needed, collection consistency, authority to collect, varying reporting cycles and the unsettled nature of distance education.

STUDY FINDINGS

Although many organizations collect data on higher education, HECB staff found no single source that can, at this time, capture specific information on enrollment of Washington residents in distance education programs.

However, the HECB has conducted two surveys that help establish a general picture of the role played by distance education providers in meeting our state's higher education needs. While there are significant impediments to the collection of accurate enrollment data from these providers, the HECB is prepared to monitor and track developments in the field.

Feasibility Study: Distance Learning Enrollments In Independent Institutions

December 1999

BACKGROUND

In 1999 the Legislature approved a budget bill (ESSB 5180), which included language directing the Higher Education Coordinating Board (HECB) to complete a study:

> *"...study the feasibility of collecting Washington enrollment data on distance learning programs sponsored by private institutions in Washington as well as by institutions outside of the state of Washington..."*

The bill directed the HECB to work with the Office of Financial Management and the State Board for Community and Technical colleges in the study, and to report findings to the Legislature by January 2000.

E-LEARNING CONTEXT

Telecommunications technologies are driving higher education toward significant cultural changes. In particular, the development of computer-based online instruction creates the potential for students to access instruction anywhere and at any time. The proliferation of e-commerce applications, increasing computer ownership, and access to a worldwide information network are redefining how education is delivered and offering learners exciting and diverse new education opportunities.

In 1995, the U.S. Department of Education estimated that a third of all institutions offered distance education courses and another 25 percent were planning new offerings. The speed of the development of the Internet in the intervening years has made these estimates seem primitive.

Across the country, traditional institutions are creating far-flung partnerships and virtual universities, and integrating so called "distance learning" into their regular course offerings. New collaborations such as the Western Governor's University aim to broker learning opportunities in an academic "common market." The Southern Regional Electronic Campus, for example, spans 15 participating states; the Colorado-based National Technological University beams engineering coursework via satellite from 50 major universities to clients worldwide. Locally, the University of Washington has joined the "Hungry Minds" consortium of research institutions to do the same in differing fields.
At the same time, for-profit and other "non-traditional" entities are moving into the higher education marketplace. In the article "Not So Distant Competitors,"[6] Ted Marchese suggests

[6]Marchese, Ted "Not So Distant Competitors: How New Providers are Remaking the Post Secondary Marketplace," AAHE Bulletin May 1998.

that Wall Street entrepreneurs are viewing higher education as ripe for the picking. Morgan Stanley Dean Witter calls the new educational marketplace "an addressable market opportunity at the dawn of a new paradigm."

In addition to the many non-traditional providers springing up, there also are others who will broker the flood of online courses and programs hitting the World Wide Web. Some are merely indexing services such as the CASO Internet University and the University of Texas World Lecture Hall that are essentially portals to thousands of courses. Others, such as Regents College in New York or Pima Community College in Tucson, are creating partnerships that will enable students taking Microsoft or Novell certification courses to earn college credits and degrees.

Education programs specifically focused on the needs of business and industry are another developing resource. For example, the Michigan Virtual Automotive College plans to become the corporate provider-of-choice for workers in the automotive industry, creating custom designed courseware and offering it to five million auto workers worldwide. Further, new software tools enable distributed learning environments on a just-in-time basis. Publishers such as Ziff-Davis, Prentice Hall, and many others are partnering with content experts and instructional designers to provide "better-mousetrap" instructional offerings. This new courseware may successfully compete with the traditional "cottage-industry" approach to higher education course development.

Disassembling instructional services. Twenty-first century technologies are fueling further cultural changes through their ability to separate the activities and services traditionally "bundled together". In the online environment, enrollment services, advising and instructional content can be separately accessed through many sources. Textbook publishers, testing organizations, library and administrative suppliers, and others can offer these services both to institutions and directly to students.

DATA COLLECTION IN THE NEW ENVIRONMENT

In the new world of education technology it will be possible for learners to get their education from a number of providers at once, through multiple media as well as traditional campuses and delivery methods. Clearly, collecting data to describe new learning behavior will require new data-collection methods and standards.

> *"As computer and telecommunications-based technologies are increasingly used to deliver instruction, adaptations will need to be made in post-secondary education administrative, planning and policy development processes. These changes will bring about a need for new kinds of data – to support underlying analytical efforts and to describe this new environment through new measures.*[7]

[7] "Technology and its Ramifications for Data Systems: Report of the Policy Panel on Technology" co-sponsored by the National Postsecondary Education Cooperative (NPEC) The George Washington University, and the National Center for Education Statistics (NCES), U.S. Dept of Education.

In this context of profound and significant change it is easy to see why policy-makers and taxpayers would like to understand the affect of these new practitioners and practices. How will they affect the availability of services? Access to education? The costs to citizens and the state? How will these new learning opportunities affect the state's need to provide enrollment, facilities, and resources?

It is not currently possible to track distance learning enrollment with any accuracy; however, the HECB is prepared to monitor and track developments in this quixotic environment.

ISSUES AFFECTING THE FEASIBILITY OF COLLECTING DISTANCE LEARNING DATA

The feasibility of collecting distance learning data is dependent upon a number of factors.

▸ **Definitions of Distance Education.** There are many ways to define distance education. The Washington State Higher Education Coordinating Board has adopted the following definition of distance learning for the 2000 Master Plan for Higher Education:

> *Distance learning takes place when teachers and students are separated by physical distance for most of the instructional delivery. The term "distance learning" course or program should only be used if:*
>
> - *Teachers and students are separated for a predominance of the instructional contact hours;*
> - *The content has been specifically designed as a course of study to increase and assess student knowledge or skills; and*
> - *An education institution provides the course content and is responsible for assessment of student achievement through credits, certification, or degrees.*[8]

▸ **Diverse Nature of Instructional Providers.** To capture an accurate picture of how distance learning might affect education planning, it first would be necessary to determine the universe of instructional providers to survey — and it's a large universe:

- Washington Association of Independent Colleges and Universities (WAICU),
- All Washington independent institutions and proprietary schools,
- Institutions not physically located in Washington,
- International providers,
- Corporate universities, and
- Lifelong learning providers (Discover U, for example).

There is no single directory of these providers. The marketplace is constantly shifting, with new players entering and leaving daily.

[8]This definition excludes "in-person" instruction offered off-campus from the definition of distance learning.

▸ **Rapid Growth of Distance Learning Education.** In 1995 the U.S. Department of Education National Center for Educational Statistics conducted a survey of distance education courses offered by higher education institutions. They defined distance education as education or training courses "delivered to remote (off-campus) locations via audio, video or computer technologies." The 1995 survey estimated that in 1994-95 higher education institutions offered 25,730 distance education courses, with 84 percent offered by public two- and four-year institutions and 16 percent by independent four-year institutions.[9]

Since then, however, the number of higher education institutions offering distance learning programs has grown dramatically. The International Data Corporation estimates that by 2002, 85 percent of two-year colleges will offer distance learning courses. That's up from 58 percent in 1998. And 84 percent of four-year colleges will offer distance learning courses in 2002, up from 62 percent in 1998.[10]

▸ **Types of Enrollment Data.** Budget proviso language refers to a specific set of enrollment data to be collected. Therefore, HECB staff considered the following data sets likely to be of use in answering legislative questions:

- Number of courses taught using distance learning technologies,
- Number of programs offered using distance learning technologies,
- Number of Washington State residents enrolled in courses and programs offered by in-state independent providers, and
- Number of Washington State residents enrolled in courses and programs offered by institutions located outside the state.

▸ **Collection Consistency.** Because purveyors of distance education vary widely, their ability to collect specific data types also varies. For example, statistics change based on point of capture: 10th day of enrollment or after one quarter? Unduplicated courses? Total headcount? For example, even if a specific school designates a class as distance learning, it may not be able to determine whether the student taking the class resides in the nearby vicinity or is taking the class from a significant distance away. Often, schools have data on general enrollment but don't categorize students by state of residence. Schools differ in their ability to determine if enrollment headcount is "unduplicated." [11]

▸ **Authority to Collect Data.** Current regulatory schemes do not give any particular entity authority to collect this data, nor do they mandate institutions to track enrollment data by student residency. Such data are not required under Washington's Degree Authorization Act, although

---

[9] Issue Brief Distance Education in Higher Education Institutions: Incidence, Audiences and Plans to Expand, NCES February, 1998. Note: Data for independent two-year institutions were not reported because there were too few institutions of this type in the sample offering DE courses.

[10] Based on data from International Data Corporation's Online Distance Learning in Higher Education 1998-2002 as reported on their web site http://www.idc.com/Data/Consumer/content/CSB020999PR.htm 10/15/99.

[11] Determining whether a headcount is unduplicated means establishing whether the student is taking only one course or a program, taking several courses that are distance learning, or taking a schedule within a given quarter or semester that includes instruction offered both on and off campus.

the state does investigate the scope and quality of distance offerings as part of its ongoing efforts in consumer protection. Accrediting agencies also pay attention to the scope and quality of instructional offerings, but they do not monitor enrollment in specific programs or types of delivery mechanisms.

▸ **Sources of Data Collection.** Many organizations and entities currently collect statistics about higher education in general. Many are considering the possibility of collecting information about distance learning. Foremost in this effort is the U.S. Department of Education, National Center for Educational Statistics (NCES). In 1995 an NCES survey attempted to capture the universe of schools offering distance education courses and programs. However, in the fast-paced world of e-commerce and e-learning, the broad scope of federal collection inhibits the capture of specific information and quick turn-around of data.

▸ **The Role of Accrediting Agencies.** Accrediting agencies also are investigating the affect of distance education on quality of instructional programs and courses. However, according to Larry Stevens, Deputy Executive Director of the Northwest Association of Schools and Colleges, it will be difficult to collect useful enrollment data due to the cyclical nature of accreditation cycles. Given the 10-year accreditation cycle, collecting distance learning enrollment data would be a decade-long project.

Nationally, education data also is captured through the Integrated Postsecondary Educational Data System (IPEDS). To date, however, IPEDS has not come up with any studies or plans for collecting information on distance enrollments.

▸ **Varying reporting cycles**. Many distance learning programs offer open enrollment or self-paced learning. Students do not begin and end their courses in traditional patterns. These factors make it unlikely that data collected will have any degree of accuracy.

▸ **Unsettled nature of distance education**. Distance learning is new and untried for many organizations. In the short run, providers will likely test the medium to see if it is appropriate for their learning objectives and business models. A Washington independent university reported offering seven college-credit courses through distance learning until last year:

> *"About the same time, faculty members were complaining that students who had completed the distance learning courses did not seem to have the same level of competency in other classes as the native students, it was discovered that the financial gains of distance learning were not outweighing the losses. So, the university decided to put distance learning on hold for one year while they performed an analysis. This past June it was determined that until distance learning or on-line courses could be shown to be financially viable, our University would not be a participant."*

Likewise, Washington's Workforce Training Education and Coordinating Board (WTECB) reports that it is struggling to determine when and how to monitor distance learning developments in independent career schools — especially those with no physical presence in the state. There is little guidance from the U.S. Department of Education. The WTECB recognizes

that these schools are private businesses, and the state may not have the authority or even justification for deep scrutiny of such programs.

HECB E-LEARNING STUDIES

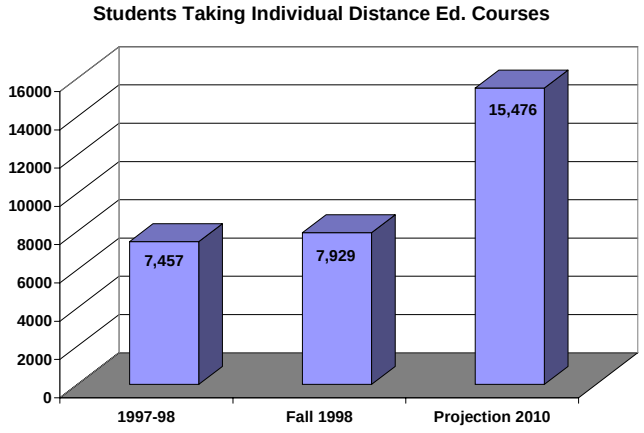
In the past year, the Higher Education Coordinating Board has completed two surveys to collect data on distance learning enrollments.

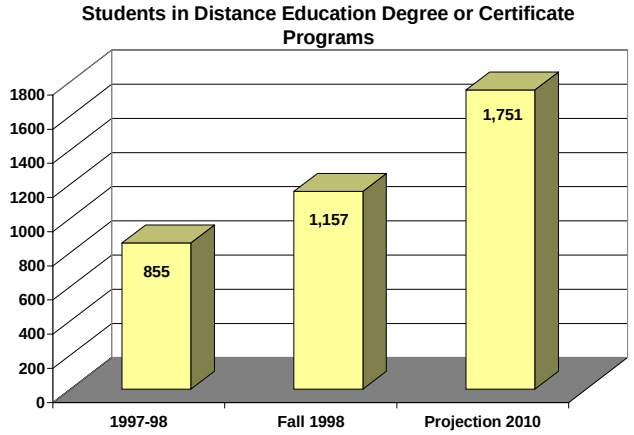
The Independent Distance-learning Provider's Survey was initiated in spring 1999 to develop a picture of the role that out-of-state and independent distance learning providers might play in accommodating higher education needs in Washington State. The HECB sent surveys to the 277 institutions listed in "Petersen's Guide to Distance Education" as offering degrees and programs to Washington students. The state-by-state listing in Peterson's Guide included any institution offering on-line classes nationally. One hundred and one institutions returned the survey, producing the following findings:

- 43 currently have or project having students in Washington State by 2010.
- Most of the responding institutions had few Washington students and most of those could be found in graduate, certificate, or special programs, such as Nursing, Fire Safety, and Aeronautical Engineering.
- 29 reported one or more students from Washington State enrolled in degree programs.
- 21 respondents reported students enrolled in individual courses.
- 13 reported enrollment in both individual courses and in programs.

The average age of distance learners was 36.8. As could be expected, respondents reported a slightly lower average age in lower-division programs and a higher average age in graduate programs. As could be expected, the gender balance of such programs matched the proportions represented in the professions. For example, nursing programs have more female students and engineering programs enroll more males. Distance learning students tended to be working adults with full-time jobs. Students in professional niche programs tended to have prior experience in their fields of study.

HECB Independent Distance-learning Provider's Survey





Master Plan Enrollment Survey. HECB staff also conducted an **enrollment survey** in the development of the 2000 Master Plan. The survey requested data and comments regarding institutions' distance enrollments as well as plans for distance learning usage to 2010.

Responses from the 10 **Washington Association of Independent Colleges and Universities (WAICU)** showed very limited use of distance education technologies. Several reported no use (Pacific Lutheran, Whitman, University of Puget Sound). Others indicated that they considered distance instruction "enrichment" rather than an expansion of capacity, or said that they were in the process of evaluating where DE would fit in their future plans.

Summarizing the survey responses is difficult because some schools reported distance education as a percent of instruction and others reported headcount. The largest headcount numbers came from St. Martin's College, which has 600 students in interactive video courses at Ft. Lewis and McChord Air Force Bases; Gonzaga reported 300 distance enrollments, primarily in their nursing program.

Overall, these schools could report what percent of their total enrollment was comprised of Washington residents, but they did not report the number of Washington residents in distance learning programs. In preparation for this enrollment feasibility report, registrars were once again asked about the possibility of reporting. This will be subject to further dialogue as the schools develop plans both for distance education and for new data collection systems.

Schools authorized to offer degree programs also received the enrollment survey. Several of these schools take advantage of distance learning delivery systems to deliver instruction, though often it is integrated into a program that includes face-to-face instruction as well. Among these providers, most of the distance offerings are used on military bases or in small-scale graduate programs.

Another group that received this survey was schools included in the federal IPEDS. Among this group, only a few (City University, NW Indian College, Antioch and Bastyr) reported offering courses via distance technologies. City University reported that 24 percent of its instructional offerings are delivered via electronic learning technologies. The Northwest Indian College reported that 66 percent of instruction includes some use of distance technology.

Related Findings From The Pilot Surveys. While it may be impossible to collect clean data, there are certainly indicators that the field of distance is growing. Many institutions are forming partnerships both inside and outside of the state in order to maximize access and opportunities for students wherever they live or work.

In the Peterson's survey, institutions were asked what initiatives would encourage or discourage them from offering courses and programs inside Washington State. Most said that although their online and distance education courses are nationally available, they do not market their programs within Washington State. This makes access rather random for students, depending upon how they come to know about particular course or program opportunities. Respondents also stated that they would be encouraged to offer programs if they knew where to find cohorts of learners.

CONCLUSIONS

Although many organizations collect data on higher education, HECB staff found no single source that can, at this time, capture specific information on enrollment of Washington residents in distance education programs.

The HECB has conducted two surveys that help establish a general picture of the role played by distance education providers in meeting our state's higher education needs. While there are significant impediments to the collection of accurate enrollment data from these providers, the HECB is prepared to monitor and track developments in the field.

The use of distance learning technologies is growing and that growth is fueling important organizational changes in higher education. However, at this time, there are significant impediments to the collection of accurate enrollment data. As distance learning matures and is integrated as yet another tool for instruction, it may become even more difficult to identify the boundaries among instructional delivery systems.

Many entities are considering how to create new data collection systems that address alternative patterns of learning and degree granting in higher education. It is possible, however, that some of the data needs will be fulfilled as the Department of Education continues to survey the field and to develop more fine-grained survey instruments. However, the field is very broad and is hard to capture because of the changing marketplace of distance education providers.

The Office of Financial Management is revising enrollment-reporting procedures through the Public Central Higher Education Enrollment System (PCHEES)[12] data collection system. Once this project is implemented, it may help establish what additional and specific information would be useful to know about independent providers.

[12] It is a legislative mandate per budget proviso in 1999 ESSB 5180 Section 129 (4) that the Office of Financial Management shall modify state information systems (PCHEES) to provide consistent data on students engaged in distance learning. Reporting on number and categories of students enrolled in distance learning by class and course level shall begin by fall term 2000.

RESOLUTION NO. 99-45

WHEREAS, The Legislature directed the Higher Education Coordinating Board (HECB) in ESSB 5180 to study the feasibility of collecting Washington enrollment data on distance learning "… sponsored by private institutions in Washington as well as by institutions outside of the state of Washington"; and

WHEREAS, The Board, in compliance with the budget proviso in ESSB 5180, has as directed, worked with the Office of Financial Management and the State Board for Community and Technical Colleges to prepare the study; and

WHEREAS, The HECB has conducted two surveys that help establish a general picture of the role played by distance education providers in meeting our state's higher education needs; and

WHEREAS, The Board has developed a written report on the feasibility of collecting distance learning enrollment data.

THEREFORE, BE IT RESOLVED, That the Higher Education Coordinating Board approves the "Feasibility Study: Distance Learning Enrollments in Independent Institutions" and submits these findings to the Washington State Legislature; and

BE IT FURTHER RESOLVED, That although there are significant impediments to the collection of accurate enrollment data from these providers, the HECB is prepared to monitor and track developments in the field.

Adopted:

December 3, 1999

Attest:

_____

Bob Craves, Chair

_____

David Shaw, Secretary