

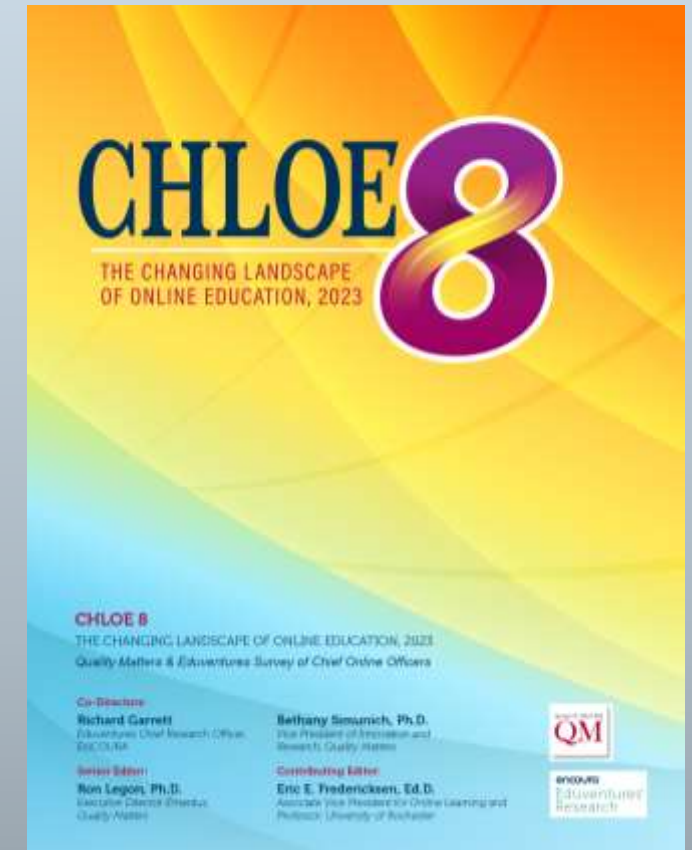
# CHLOE 8: Student Demand Moves Higher Ed Toward a Multi-Modal Future

Richard Garrett, Eduventures Chief Research Officer, Encoura

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# PRESENTERS



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*Vice President,  
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*Co-Director, CHLOE Project*



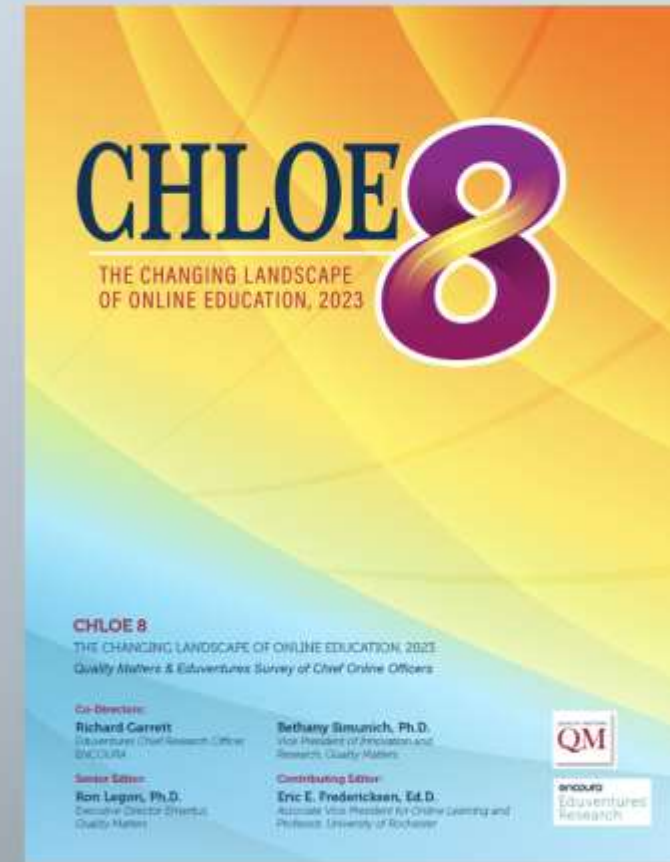
**Richard Garrett**  
*Eduventures Chief Research  
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*Co-Director, CHLOE Project*



**Eric E. Fredericksen, EdD**  
*Associate Vice President &  
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*Contributing Editor*



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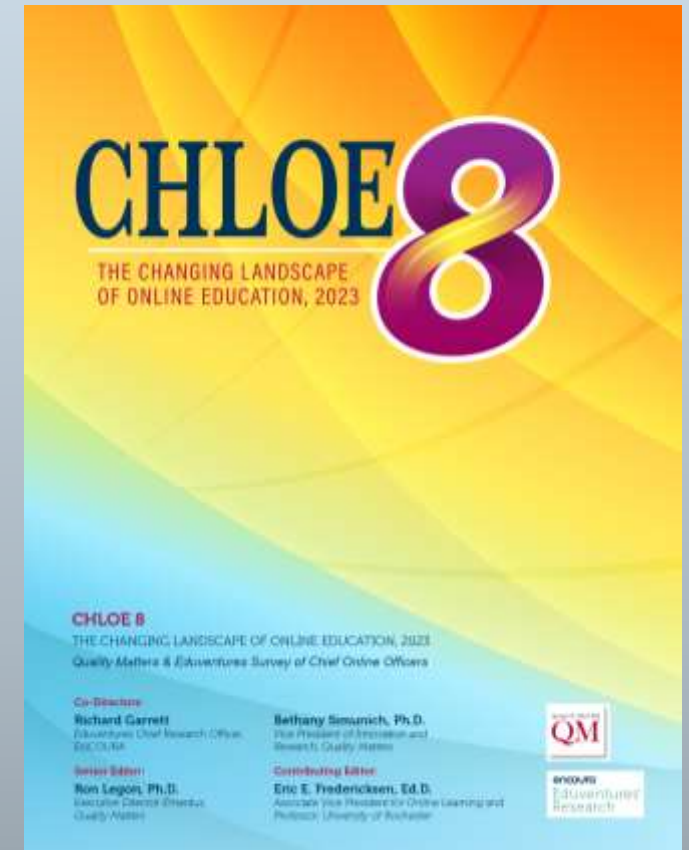


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# RESPONDENT INFORMATION



# THE CHLOE 8 SAMPLE BY SECTOR & ONLINE ENROLLMENT SCALE

(317 complete and usable partial responses)

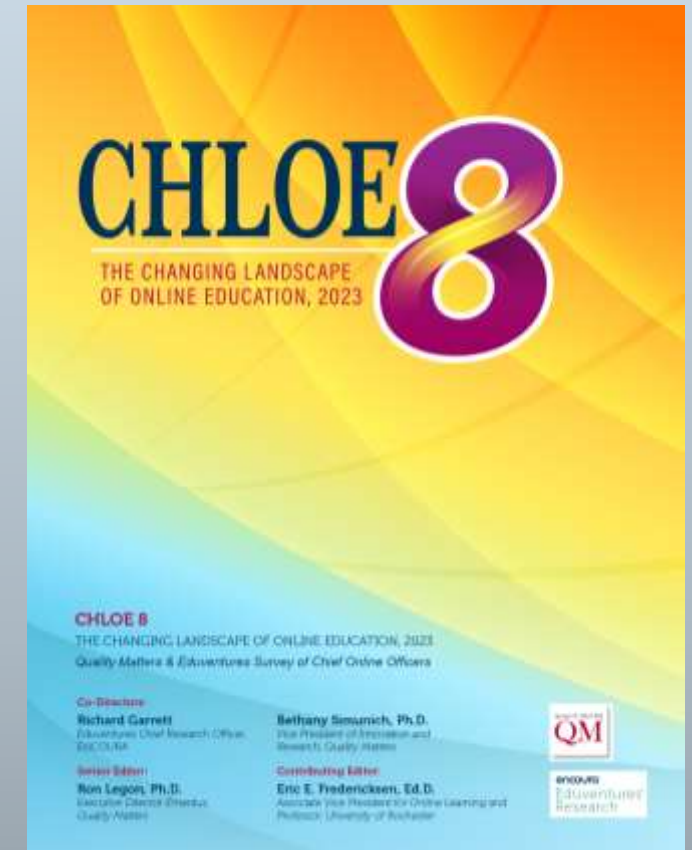
## SECTOR

Sector	Public 2Y	Public 4Y	Private 4Y	For-Profit
Institutions	22%	18%	37%	20%
Total Enrollment*	25%	47%	22%	5%
Online Enrollment**	27%	49%	17%	7%
Fully Online Enrollment*	32%	37%	19%	11%
CHLOE 8 Sample	26%	38%	35%	2%
<b>DIFFERENCE between CHLOE 8 Sample and Online Enrollment</b>	<b>-1 percentage point</b>	<b>-11 percentage points</b>	<b>+18 percentage points</b>	<b>-4 percentage points</b>

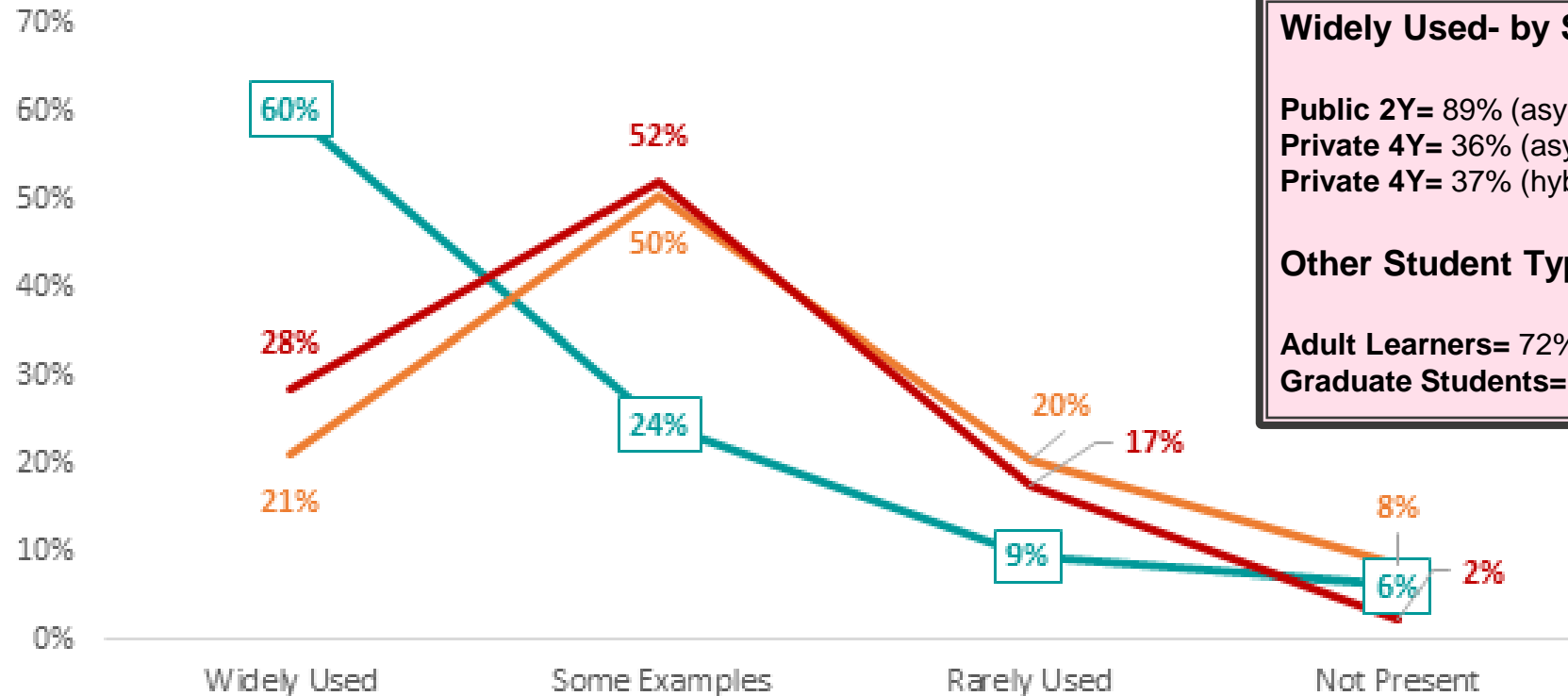
## ONLINE ENROLLMENT

CHLOE 8 Sample	Large <7,500	Mid-Sized 1,000-7,500	Small <1,000
Schools by Number of Fully Online Students	39	133	145
<b>% of CHLOE 8 Sample</b>	<b>12% (3%)</b>	<b>42% (33%)</b>	<b>46% (64%)</b>
Schools by Number of Partially Online Students	67	126	124
<b>% of CHLOE 8 Sample</b>	<b>21% (6%)</b>	<b>40% (39%)</b>	<b>39% (55%)</b>
Schools by Number of Fully and Partially Online Students	82	162	73
<b>% of CHLOE 8 Sample</b>	<b>26% (9%)</b>	<b>51% (54%)</b>	<b>23% (37%)</b>

# INSTITUTIONAL PROFILE OF ONLINE LEARNING



# ONLINE COURSES (TRADITIONAL AGE UNDERGRADS)- FULLY ONLINE ASYNCHRONOUS COURSES ARE NOW COMMONPLACE, EVEN FOR THIS STUDENT TYPE. ARE THE OTHER TWO ABOUT TO MAINSTREAM? (264 schools; fall 2022)



**Widely Used- by Segment (examples)**

Public 2Y= 89% (asynch)  
 Private 4Y= 36% (asynch)  
 Private 4Y= 37% (hybrid)

**Other Student Types (asynch, mixed, hybrid)**

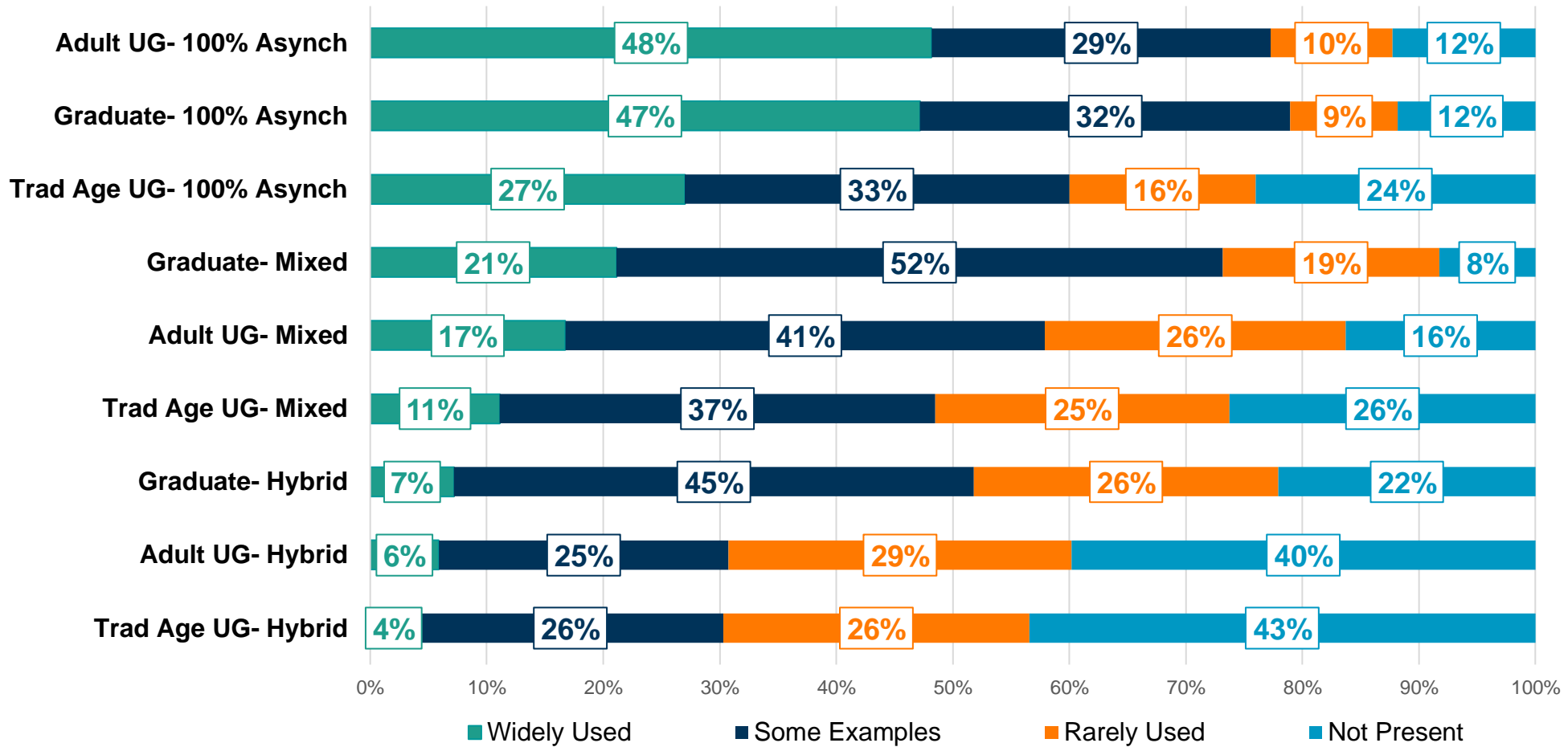
Adult Learners= 72%, 27%, 24%  
 Graduate Students= 58%, 33%, 28%

- Fully-online asynchronous (for-credit) courses
- Fully-online (for-credit) courses that combine asynchronous and synchronous elements
- (For-credit) courses that blend online and campus elements (i.e., hybrid)

# ONLINE DEGREE PROGRAMS- PREVALENCE & TYPES:

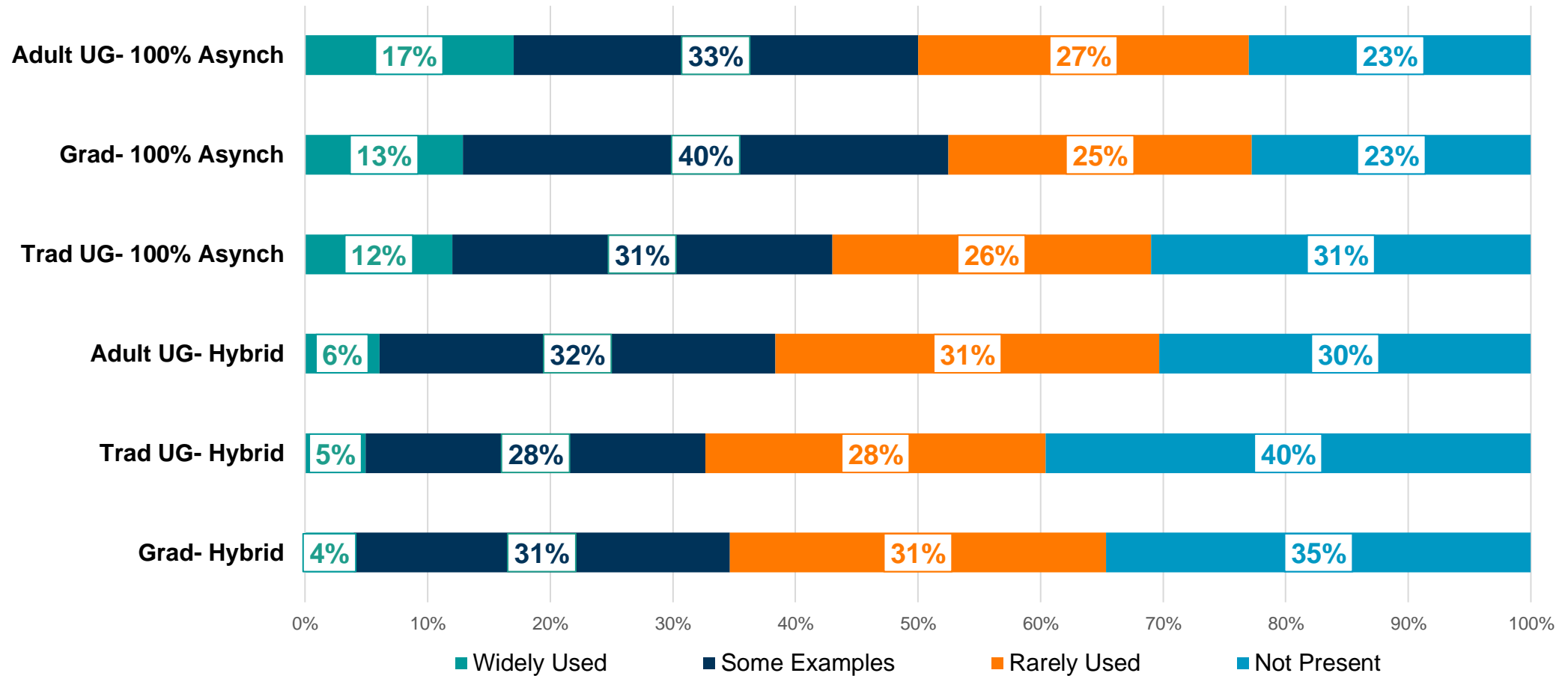
## IS IT SURPRISING THAT HYBRID IS STILL SO UNCOMMON AT SCALE?

(266-194 schools; fall 2022)

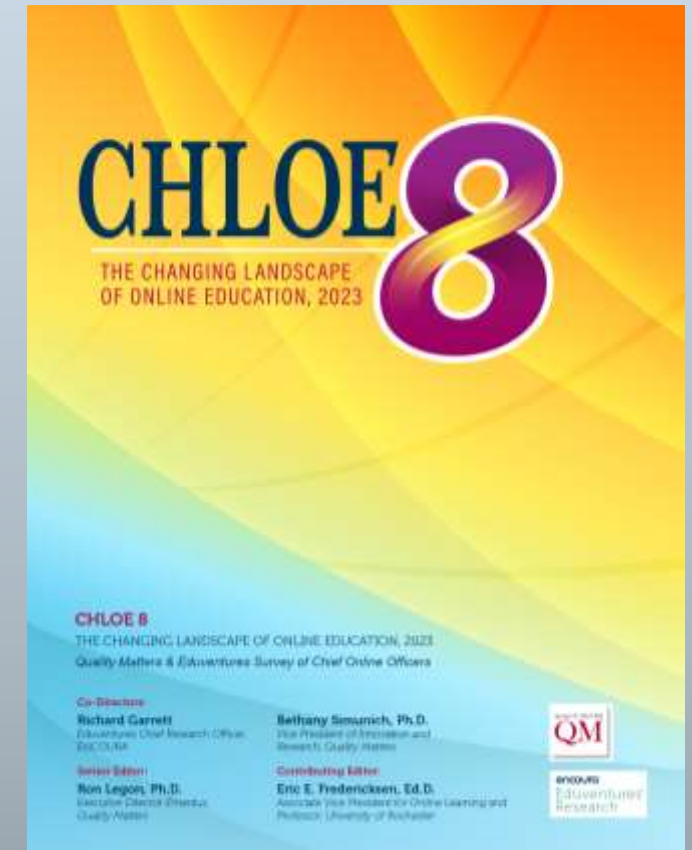




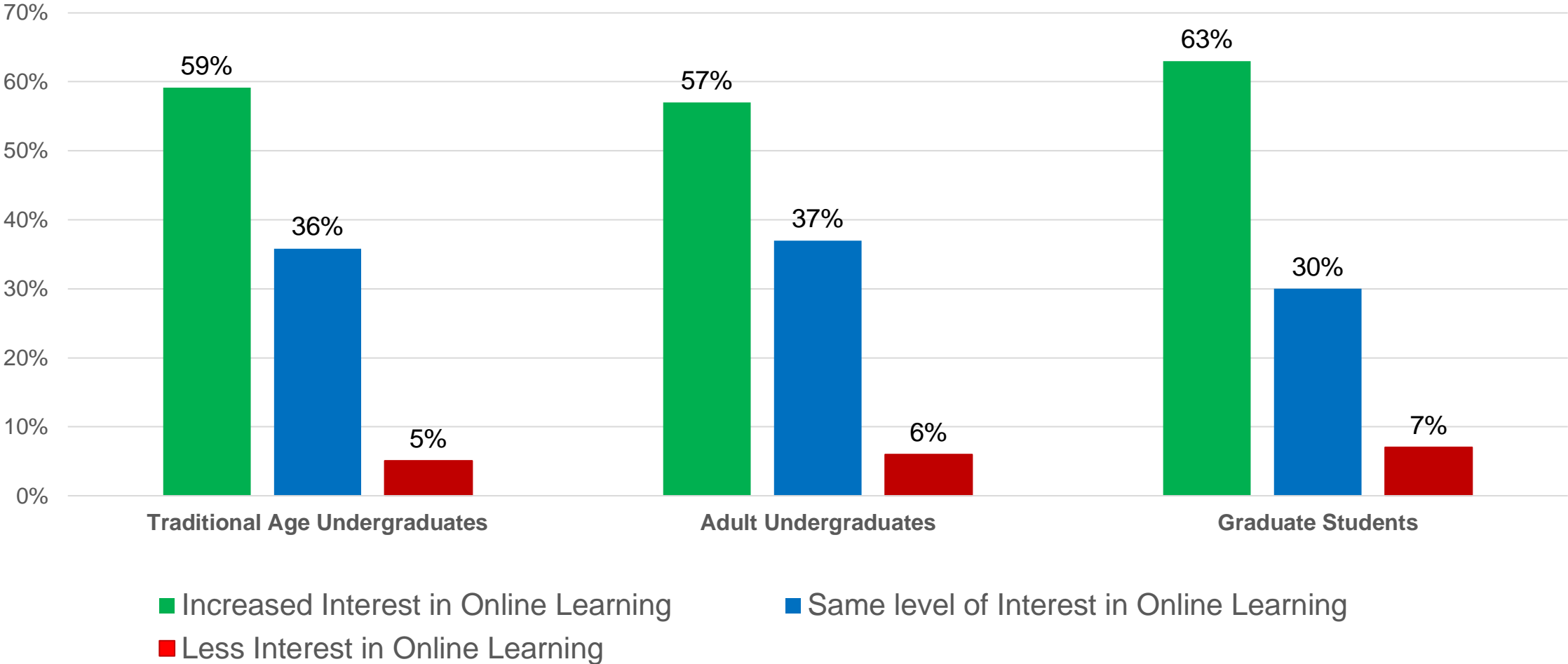
# ONLINE NON-DEGREE PROGRAMS- PREVELANCE & TYPES: IS WEAKNESS IN THE ADULT UNDERGRADUATE DEGREE MARKET DRIVING NON-DEGREE ACTIVITY? (265-195 schools; fall 2022)



# UPDATE ON PERCEIVED STUDENT DEMAND FOR ONLINE LEARNING

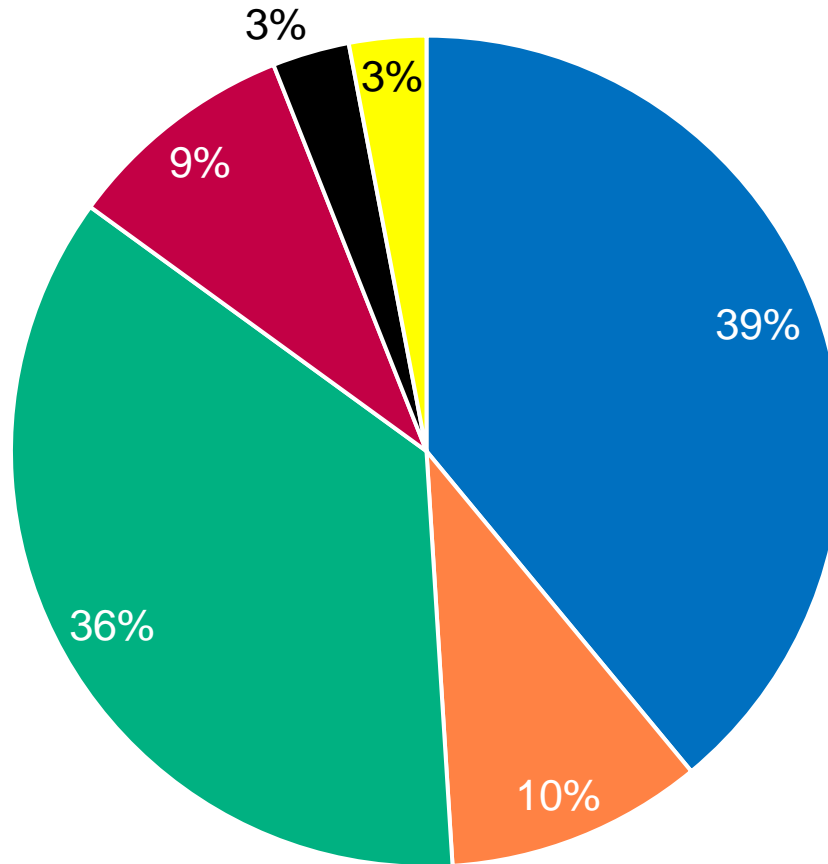


# Rising Student Interest in Online Learning by Institution, 2021–2022 (Sample = 183-257)



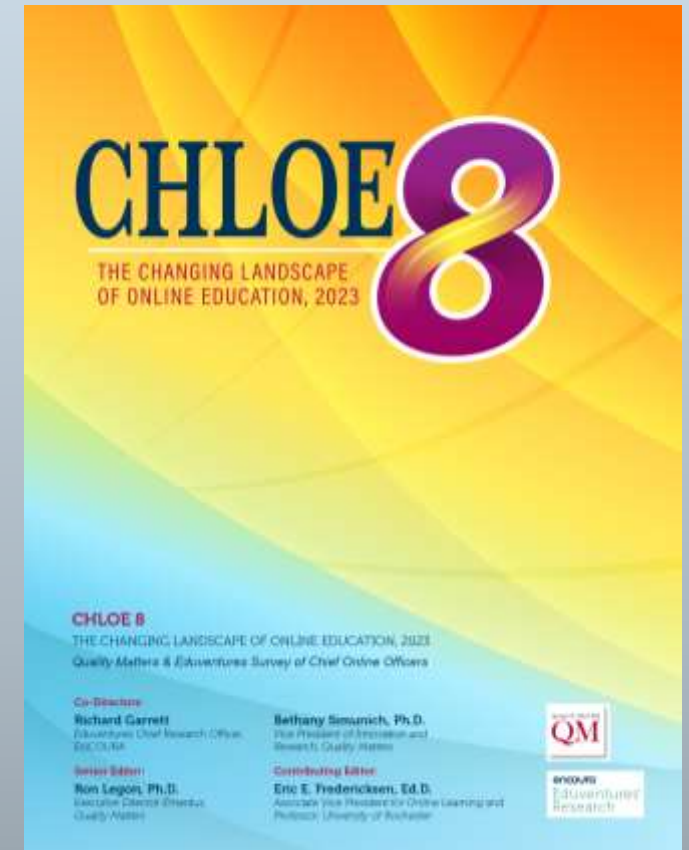
# Strategic and Resource Implications of Growing Demand for Online Learning

(Sample = 287)



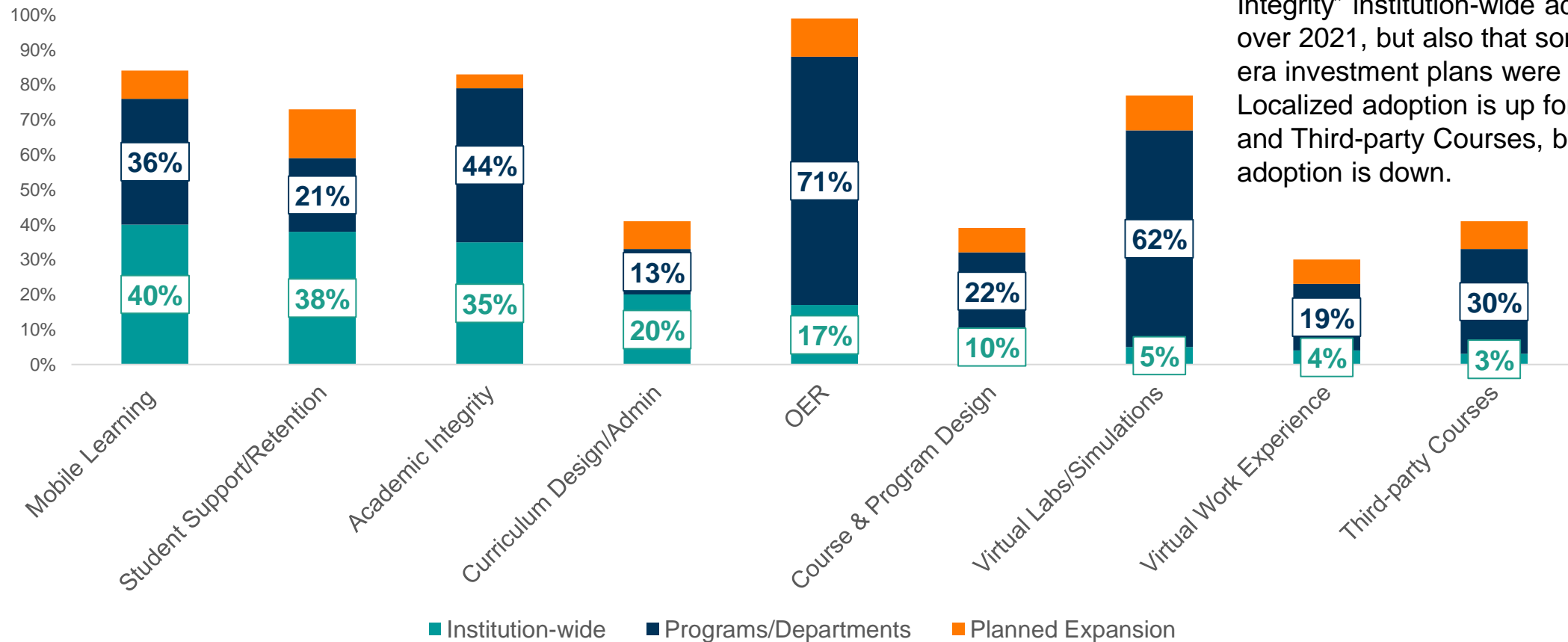
- 39% say , "Our strategic priorities are consistent with rising online demand"
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# TECHNOLOGY INFRASTRUCTURE



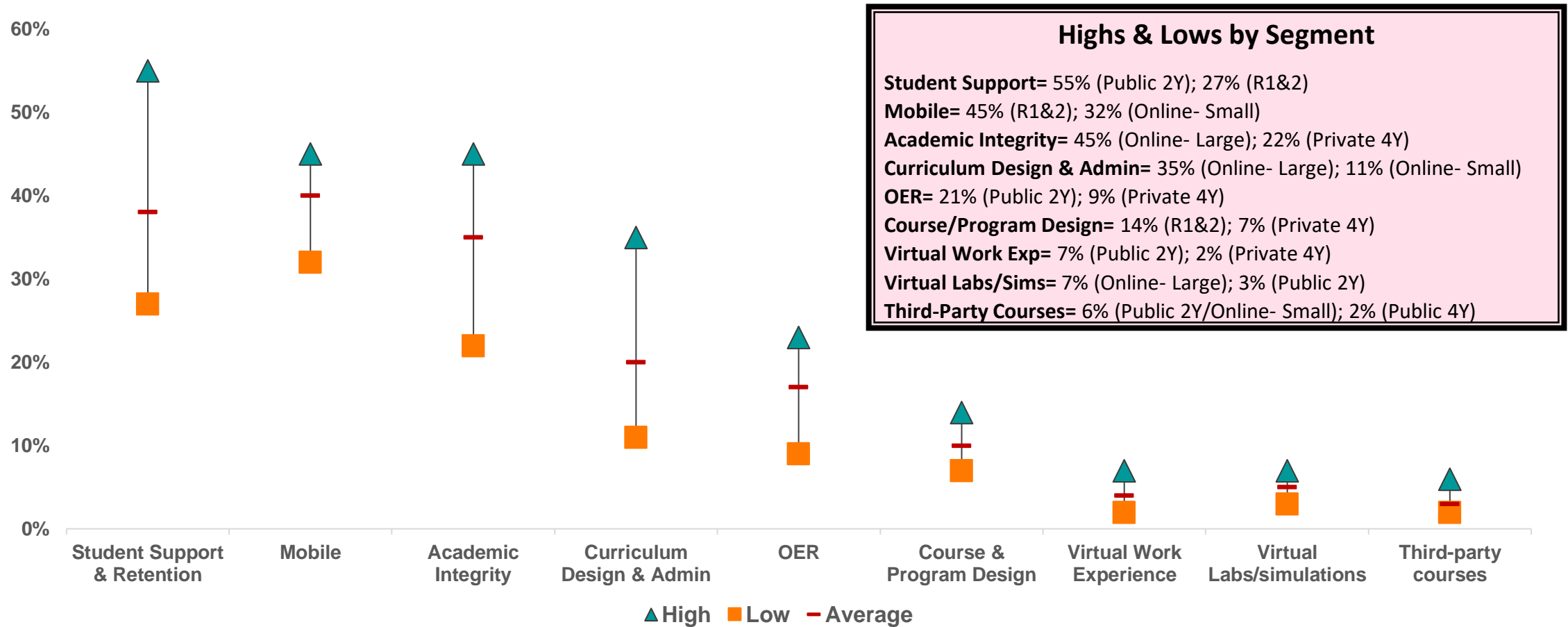
# ONLINE LEARNING TECHNOLOGIES & CAPABILITIES- SOME AREAS STARTING TO MAINSTREAM; OTHERS REMAIN LOCALIZED. BEST EXPLANATION IS ADMINISTRATION VS. ACADEMICS?

(274 schools; fall 2022)

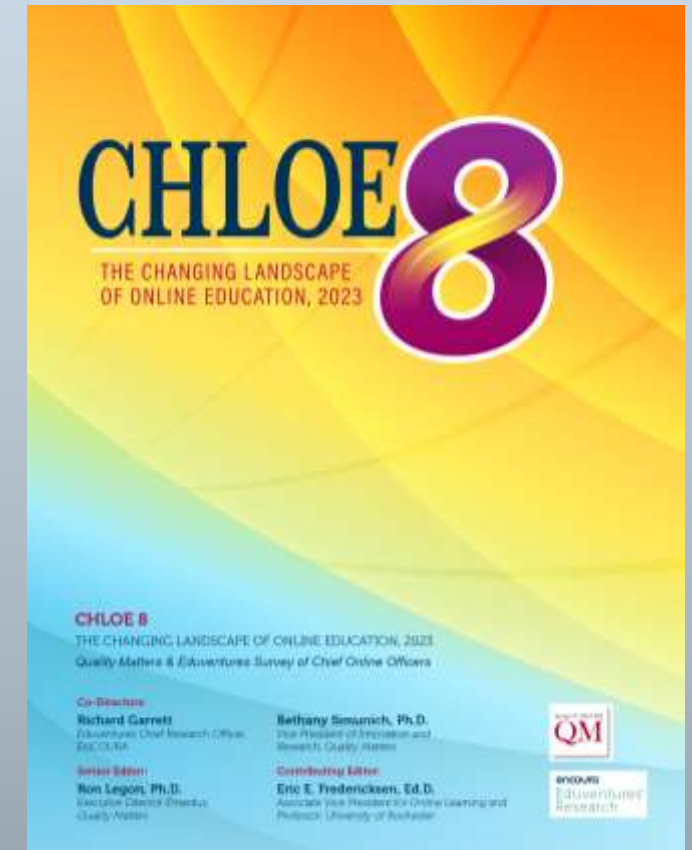


**Post-Pandemic.** Evidence that “Student Support”, OER, and “Assessment Integrity” institution-wide adoption is up over 2021, but also that some pandemic-era investment plans were reconsidered. Localized adoption is up for Virtual Labs and Third-party Courses, but institutional adoption is down.

# ONLINE LEARNING TECHNOLOGY & CAPABILITIES BY SECTOR, CARNEGIE & ONLINE ENROLLMENT SIZE- SCHOOLS WITH LARGE ENROLLMENT AND COMMUNITY COLLEGES TEND TO LEAD ON SCALED ADOPTION. SURPRISING THAT NO SEGMENT IS CLOSE TO UNIVERSAL ADOPTION OF ANYTHING? (% of schools citing institution-wide adoption) (fall 2022) (274 schools)



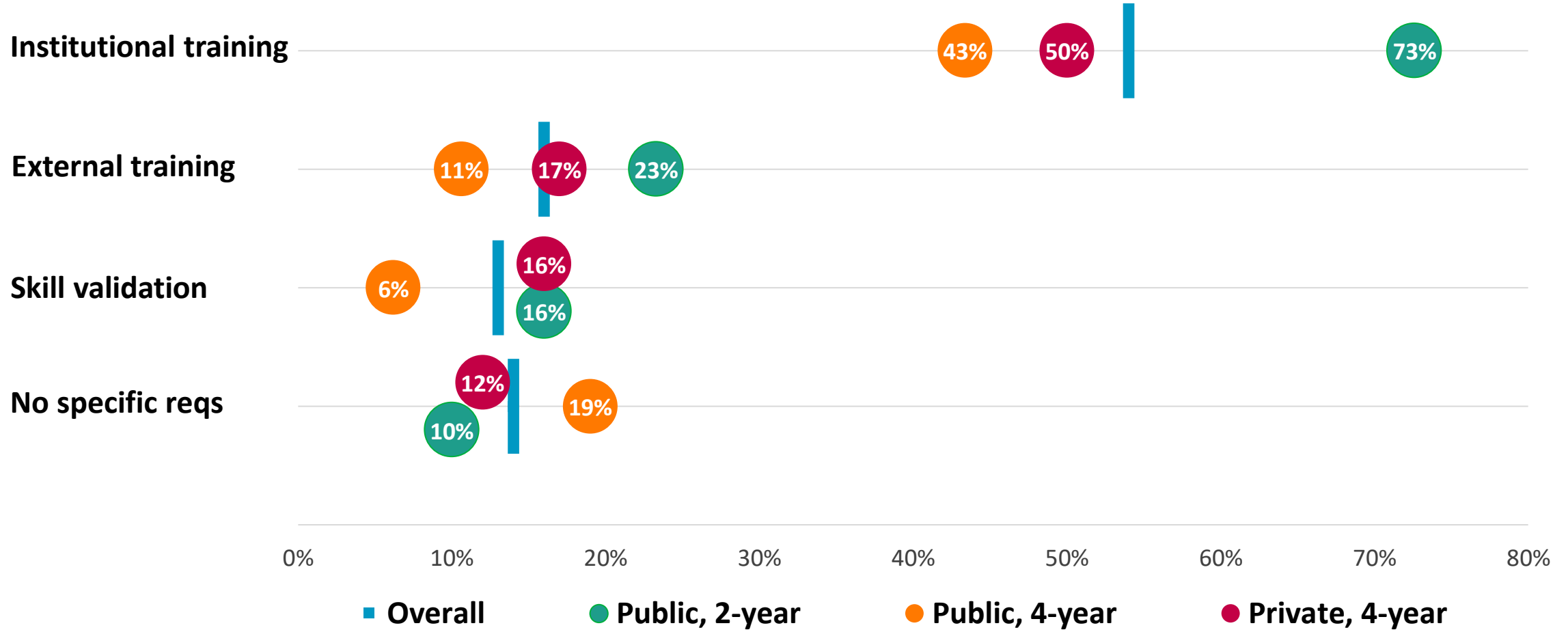
# FACULTY ONLINE TEACHING EXPERIENCE





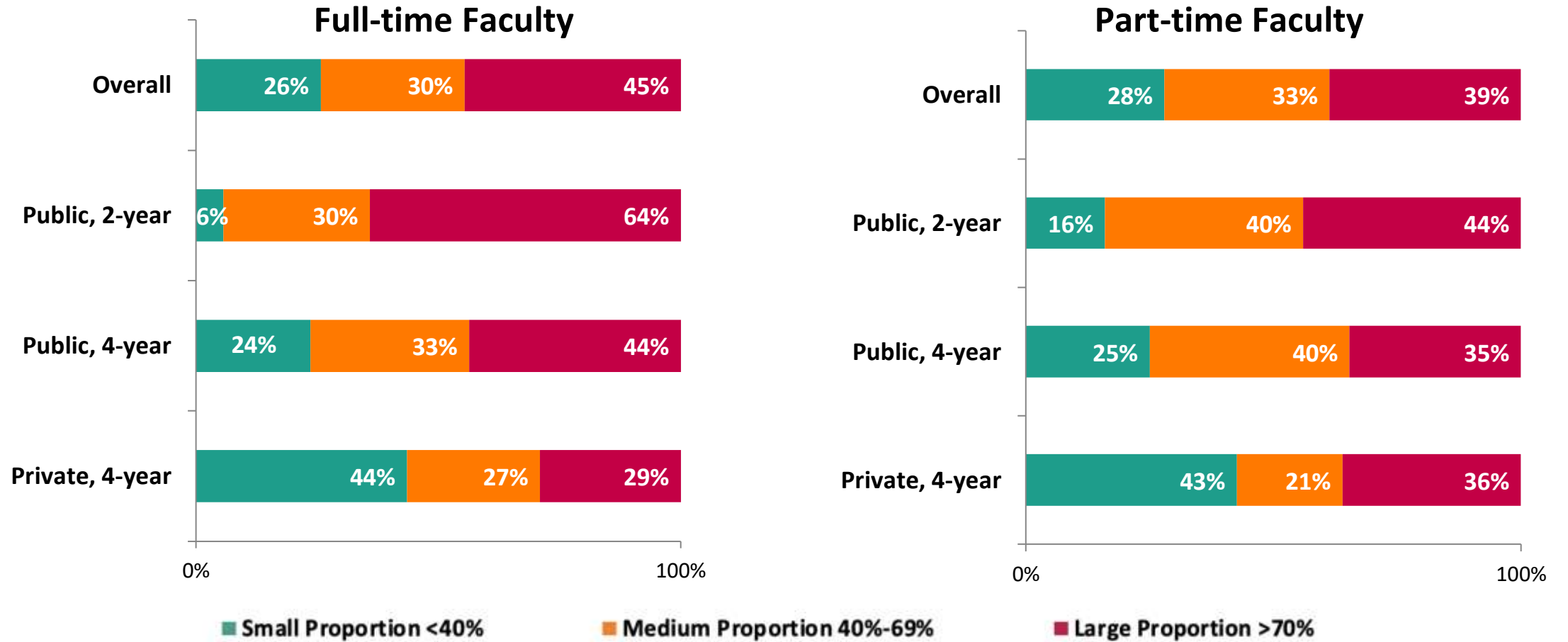
# Faculty Training Requirements for Online Teaching

Overall | Public, 2-year | Public, 4-year | Private, 4-year | n=291

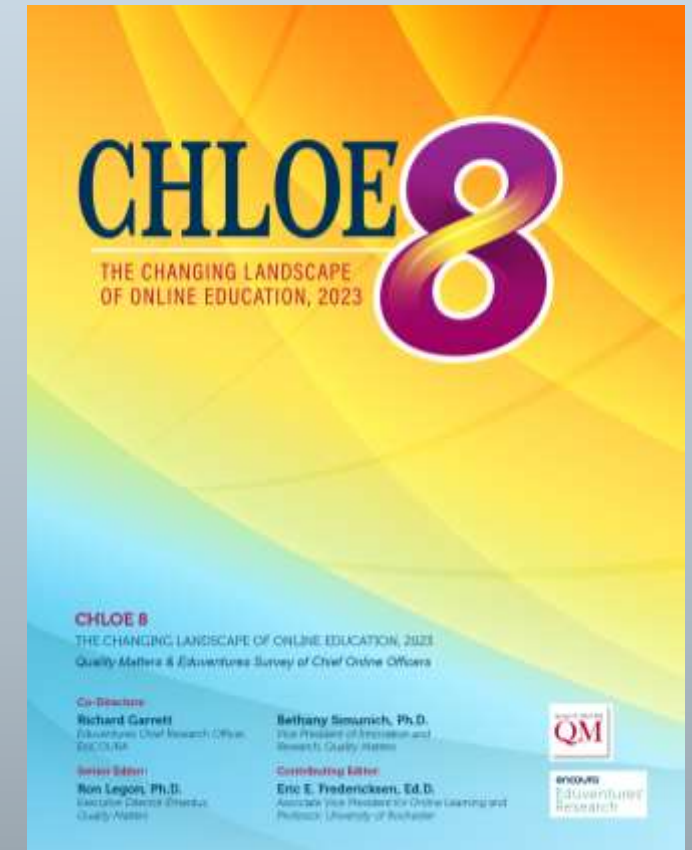


# Proportion of Faculty Approved to Teach Online by Sector

Small Proportion <40% | Medium Proportion 40%-69% | Large Proportion >70% | n=175

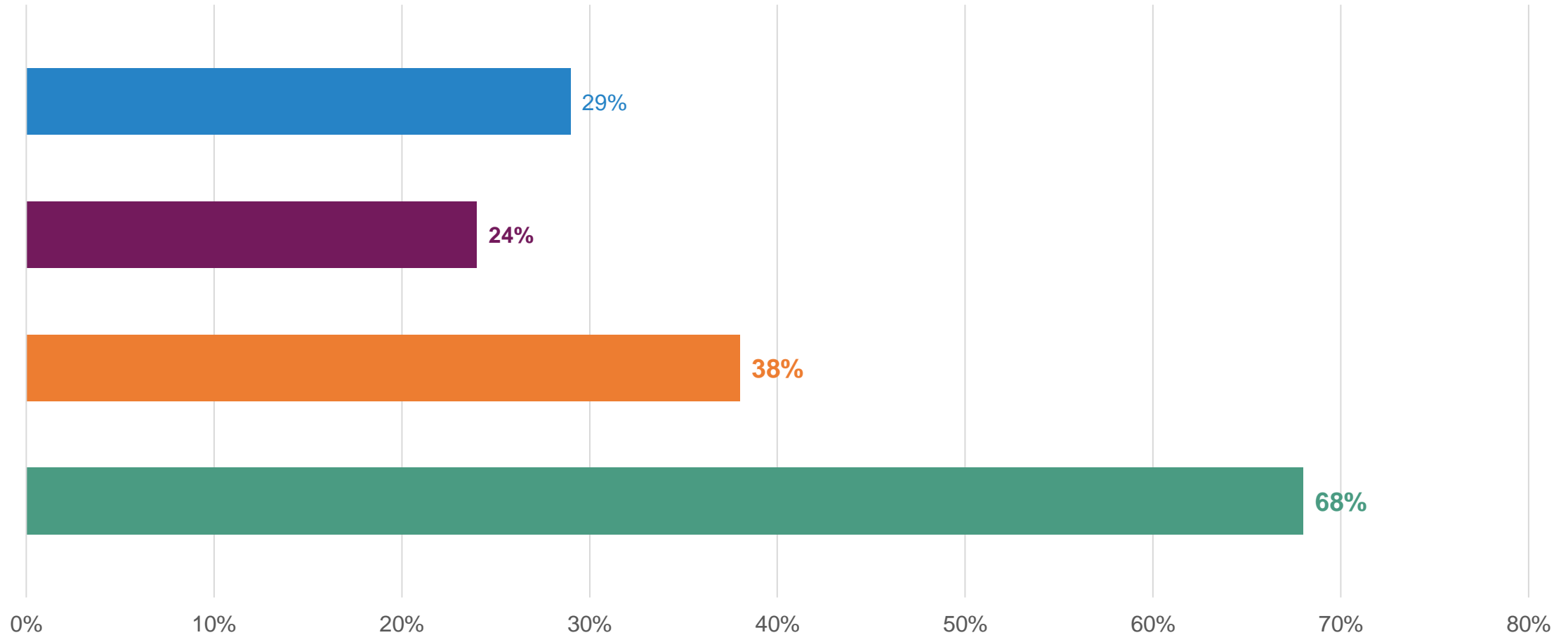


# FACULTY ENGAGEMENT



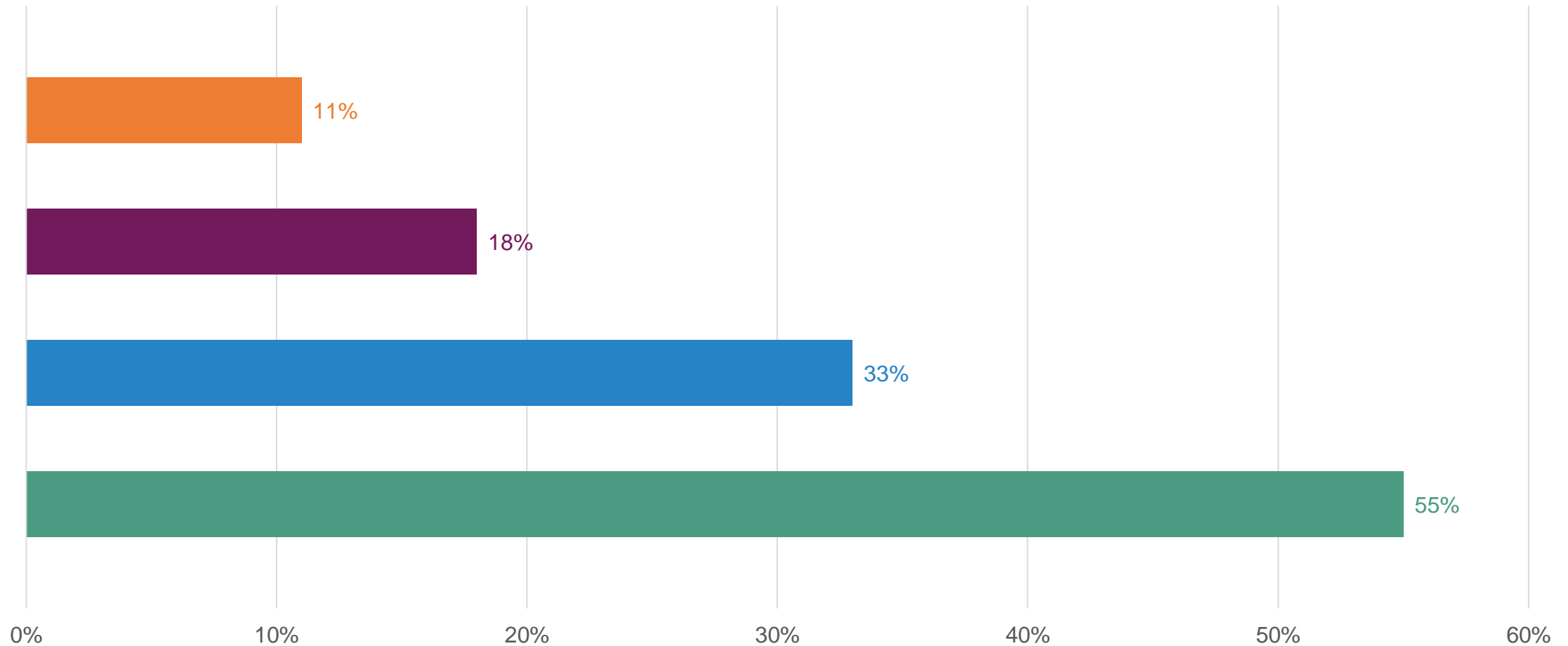
# Does your institution offer specific incentives for faculty to develop and teach online, hybrid, and/or multi-modal courses? (Course Development Incentives)

Monetary incentives | Release Time | Supervisor Stipend | Credit toward promotion/tenure | n=274

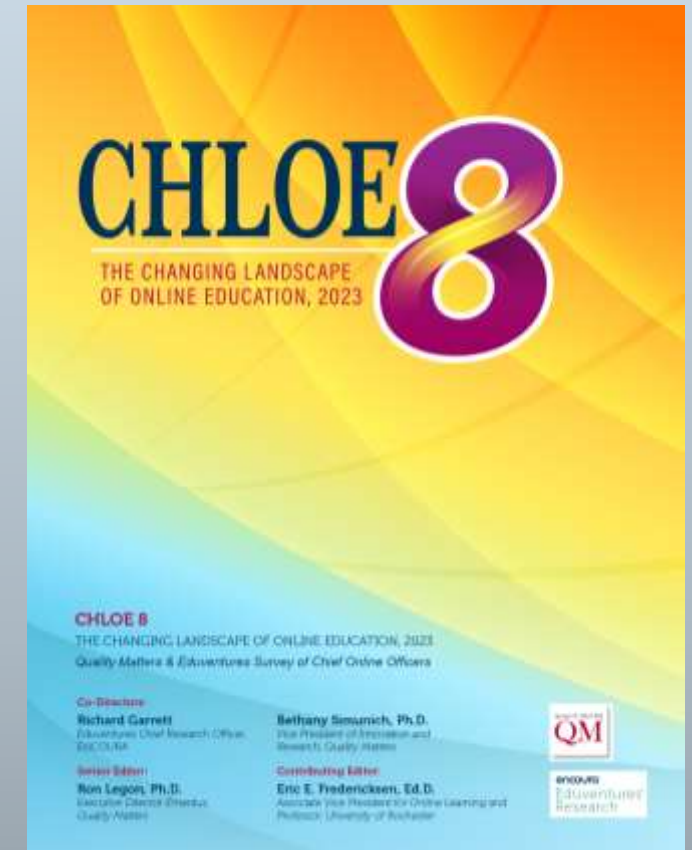


# Does your institution offer specific incentives for faculty to develop and teach online, hybrid, and/or multi-modal courses? (Teaching Online Incentives)

Work remotely | Reduced Course Load | New technology | Credit toward promotion/tenure | n=278

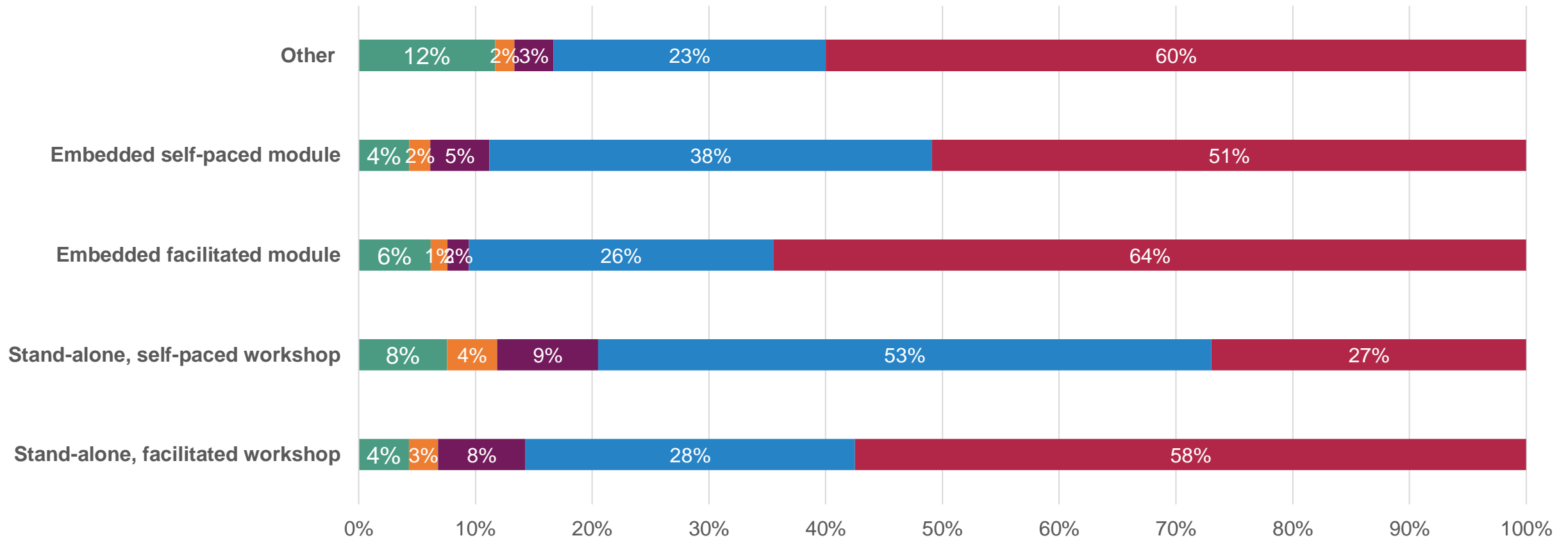


# STUDENT SUPPORT



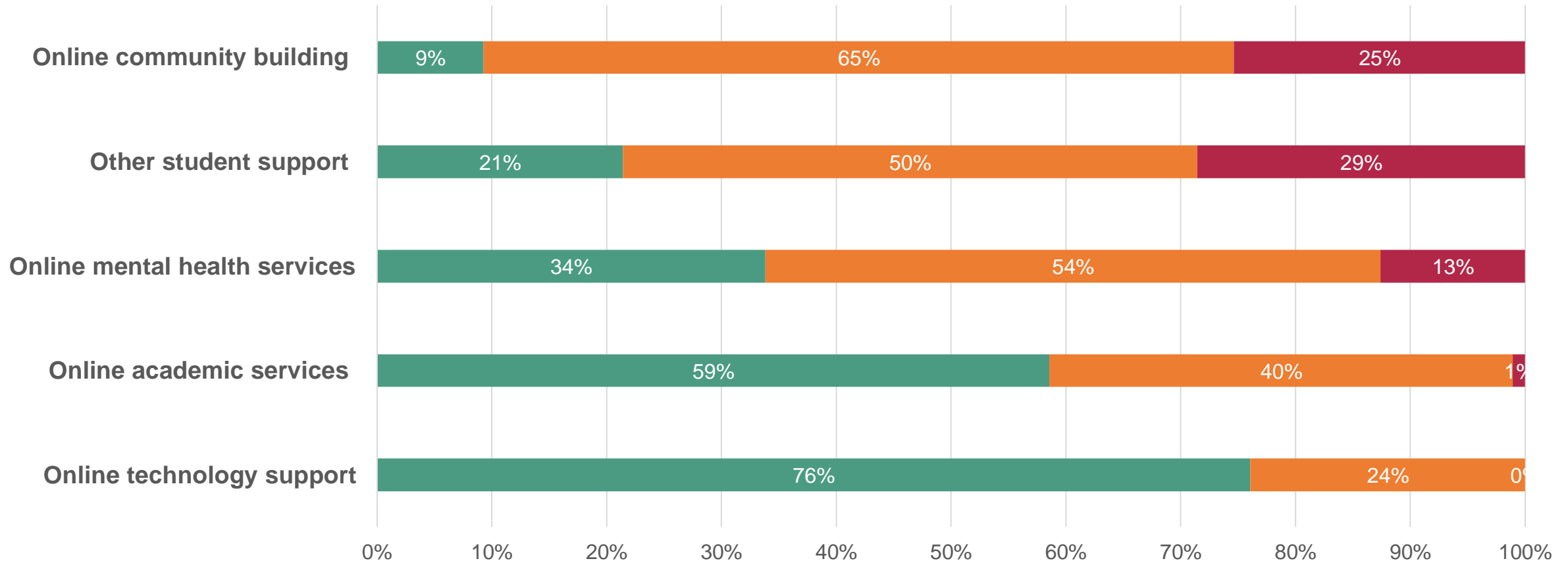
# What arrangements does your institution provide for online student readiness?

Required of all students | Required of all students partially online | Required of all students 100% online | Optional | Not offered | n=276



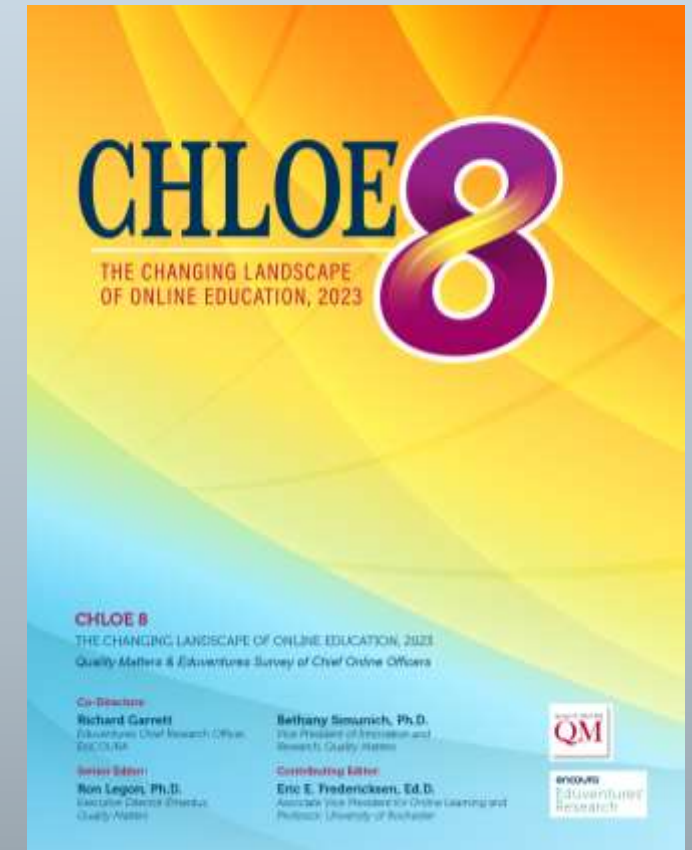
# For the following online student support items at your institution, indicate the level of development:

Fully Developed | Needs Further Development | Not Currently Offered | n=278



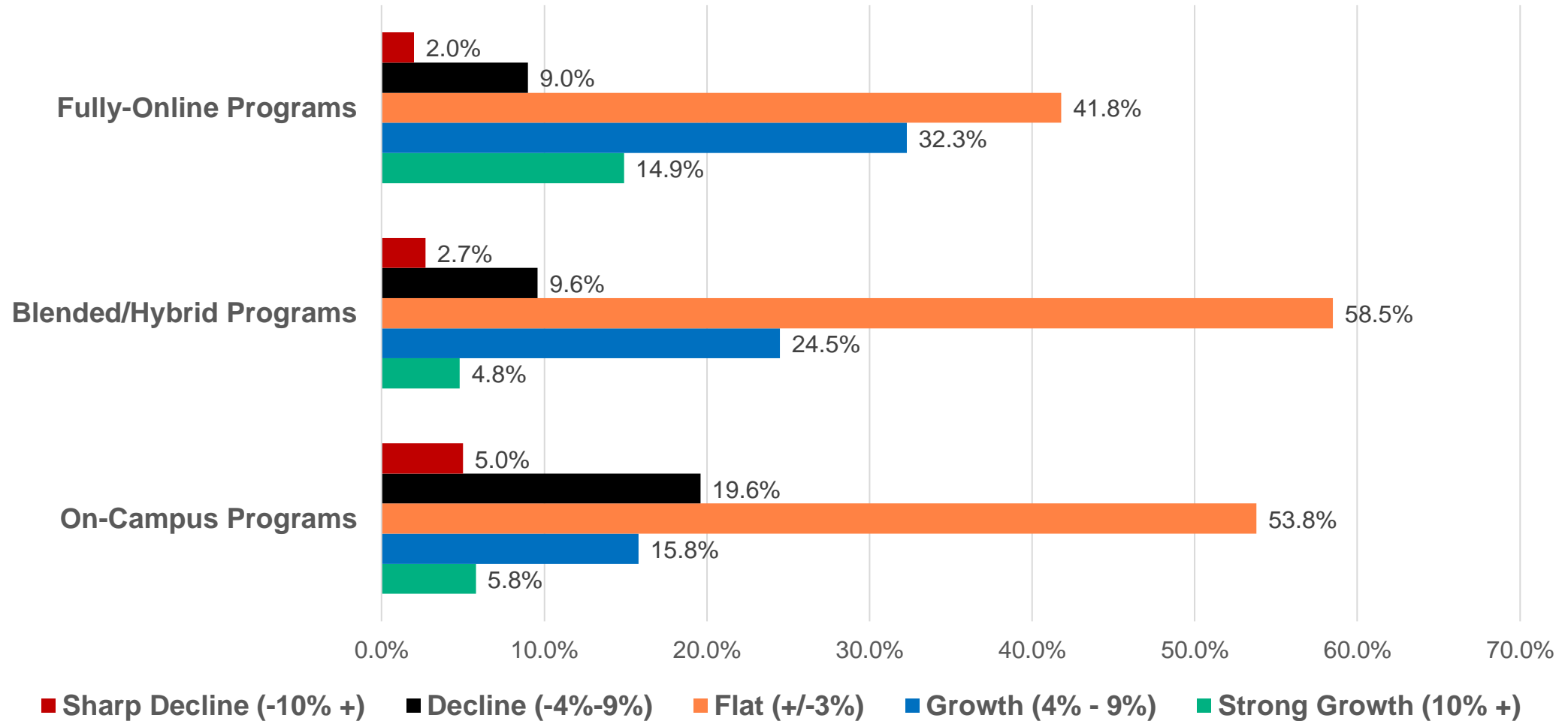


# INSTITUTIONAL ENROLLMENT TRENDS FOR ONLINE PROGRAMS



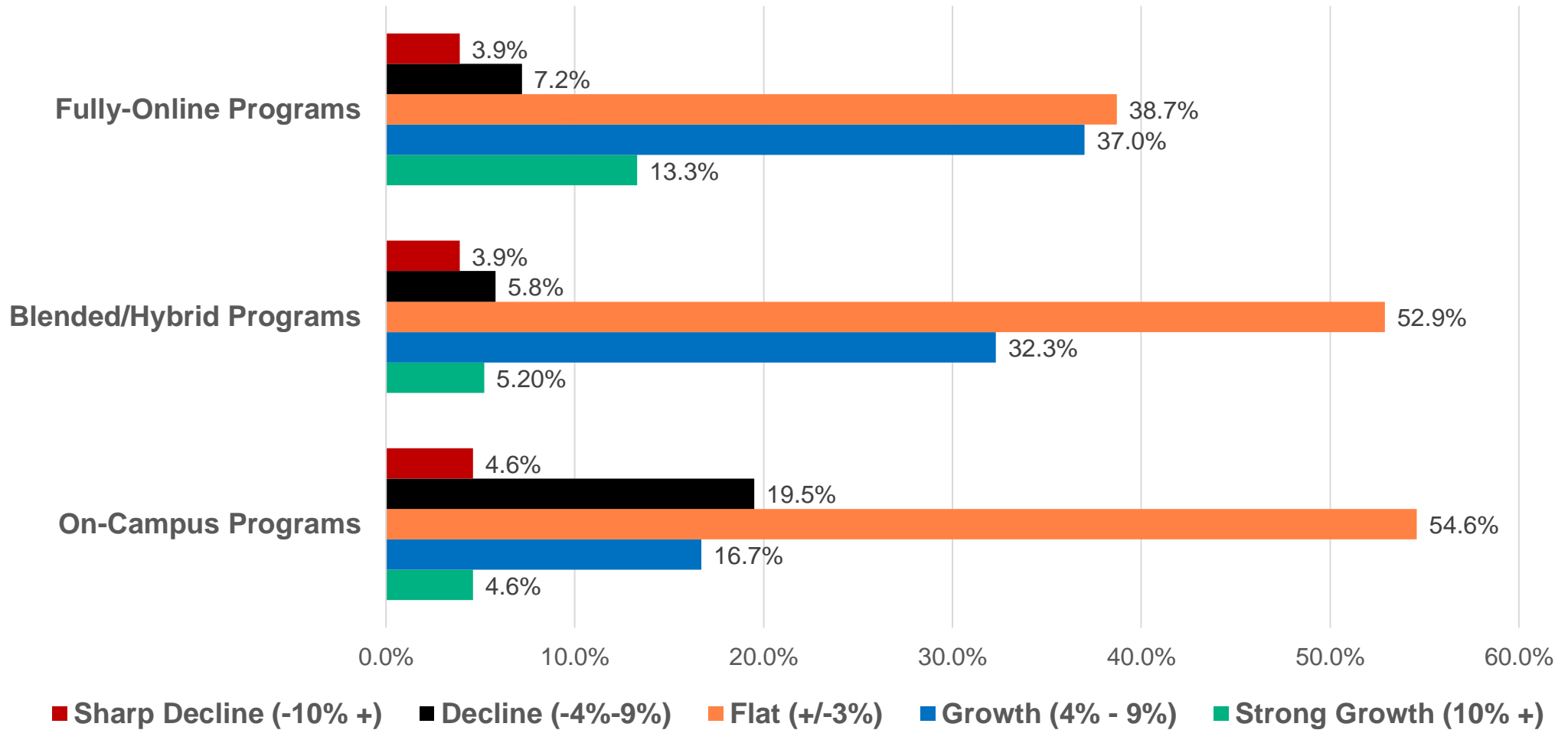
# Schools Report 2021–2022 Enrollment Shifts

## Traditional Age Undergraduates, Less than 25 Years (Sample = 292)

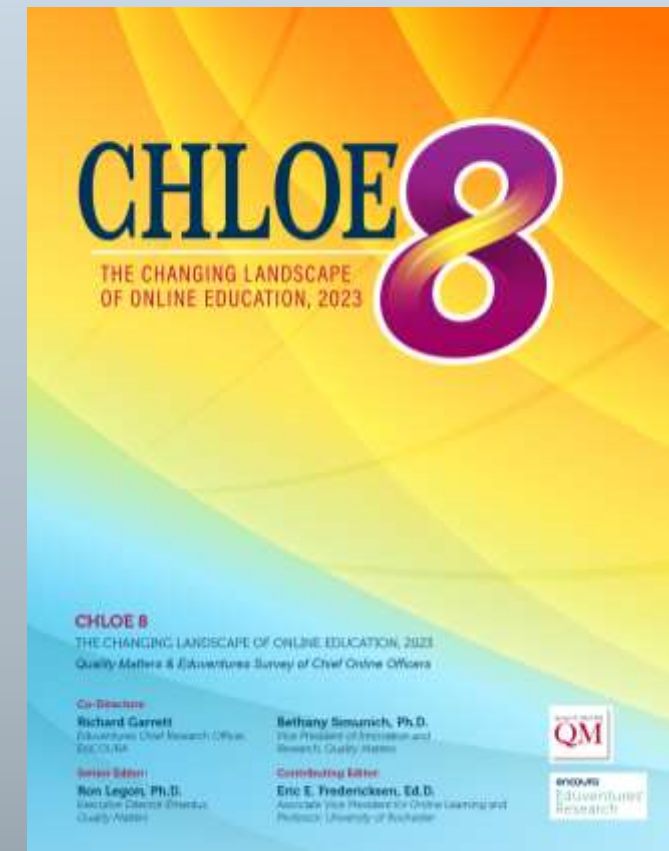


# Schools Report 2021–2022 Enrollment Shifts

## Graduate Students (Sample = 292)

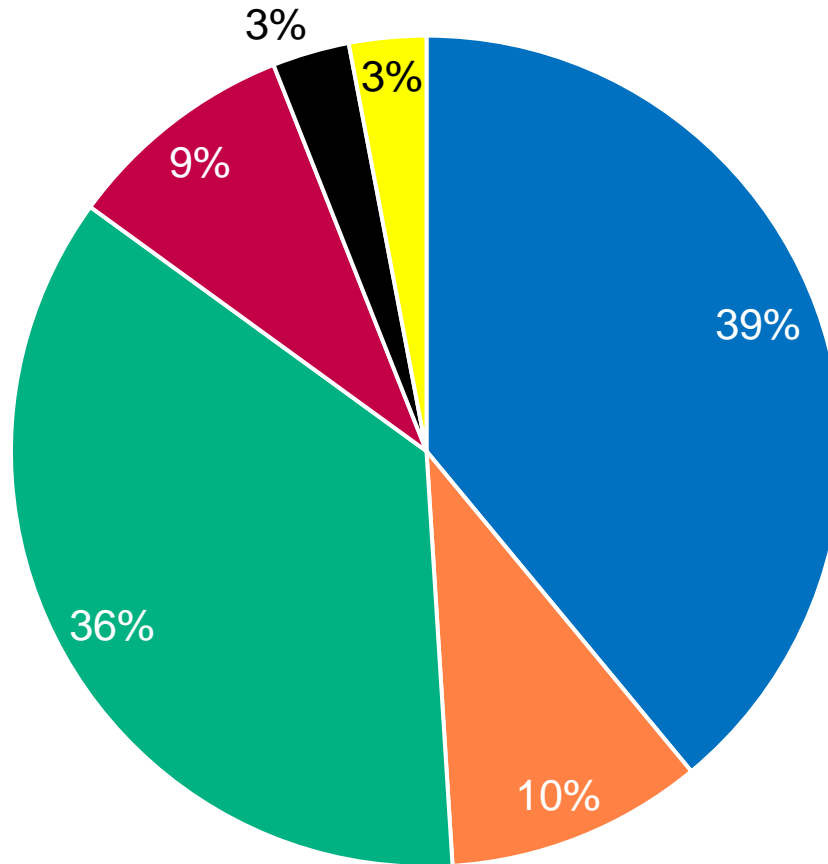


# PRIORITIES AND STRATEGIES FOR NEW ONLINE DEVELOPMENT



# Strategic and Resource Implications of Growing Demand for Online Learning

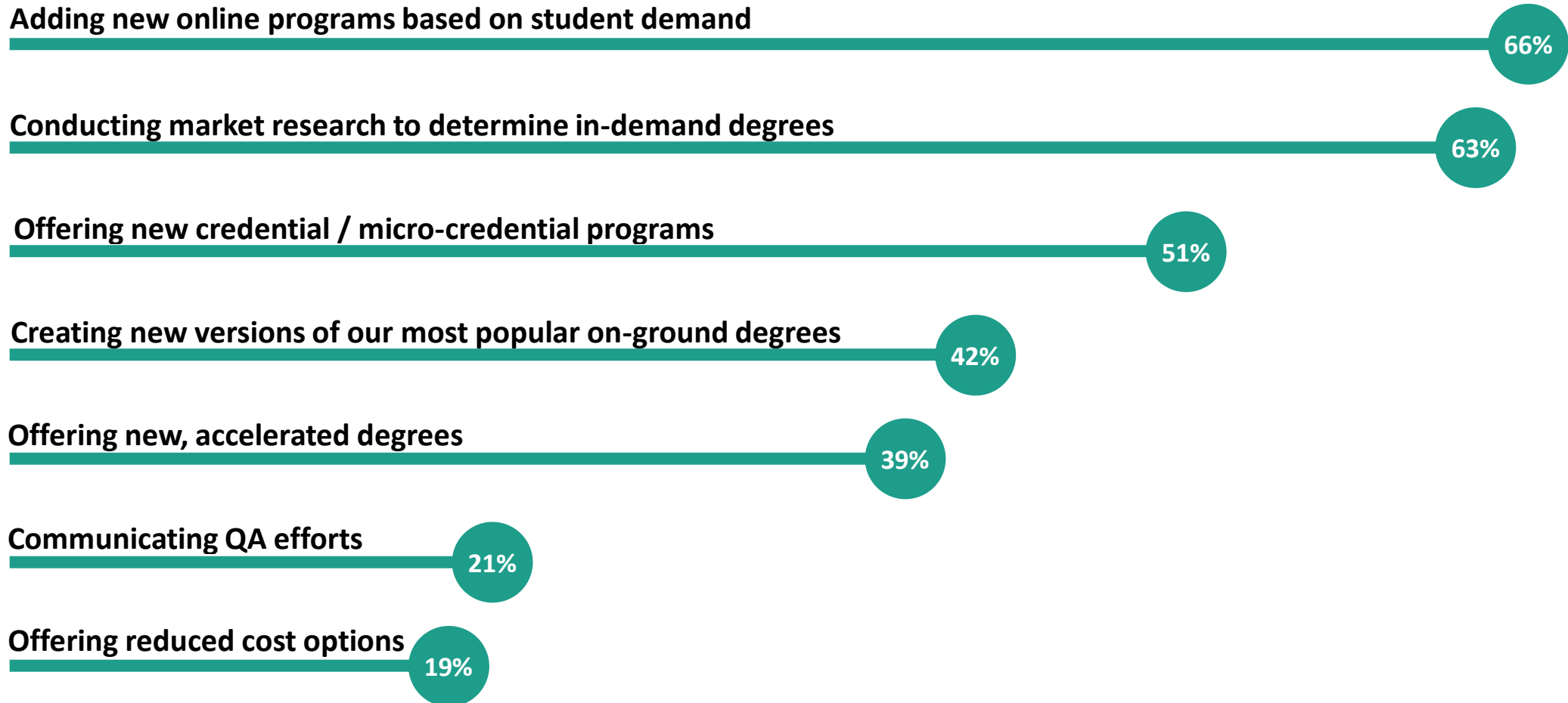
(Sample = 287)



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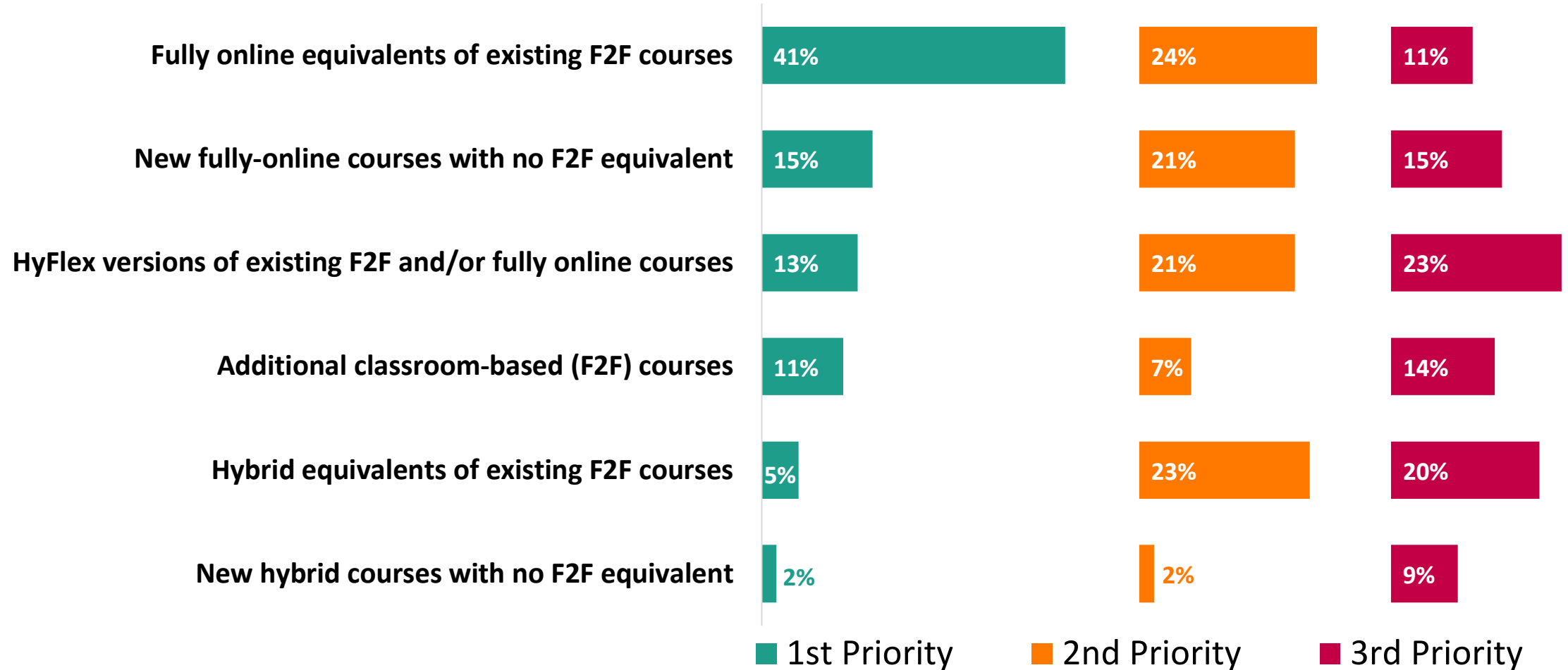
# How Institutions are Pursuing Future Online Student Audiences

n=264

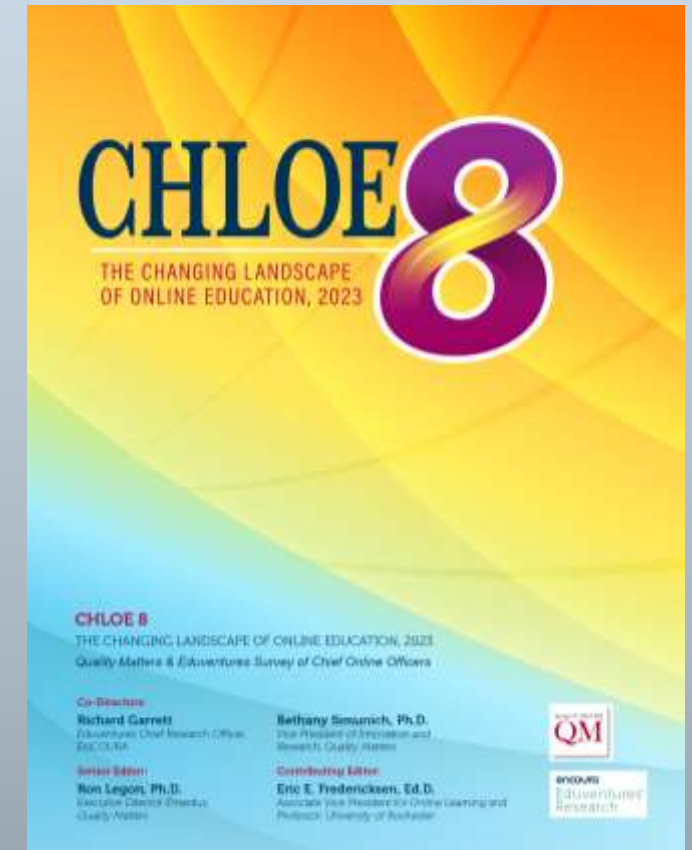


# Institutional New Course Development Priorities

1<sup>st</sup> Priority | 2<sup>nd</sup> Priority | 3<sup>rd</sup> Priority | n=276



# QUALITY ASSURANCE EFFORTS & COMMUNICATION





# Communication of Quality Assurance Efforts

We practice it | We communicate it to current students | We use it to recruit | n=266

Commitment to reliable tech support for online students

17%

32%

64%

Quality online teaching

10%

11%

64%

QA benchmarks achieved by online courses and programs

9%

13%

60%

Quality of online options for academic support

18%

26%

51%

● We use it to recruit

● We communicate it to current students

● We practice it

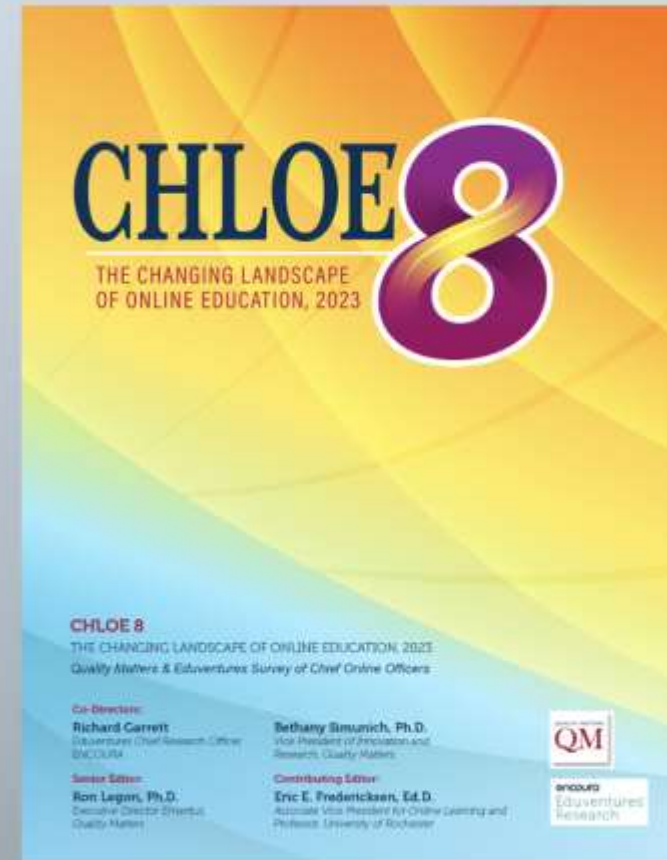
# CHLOE 9: What topics are of greatest interest?

- **Modality:**
  - Is asynchronous continuing to dominate online modality options? What are COOs using to determine demand for specific modalities?
  - What are accelerants or inhibitors for more use of synchronous and hybrid options?
- **Strategy:**
  - Tensions between COOs and institutional culture/leadership regarding online learning direction, logistics, etc.
  - How are institutions continuing to meet the demand for online learning? (if at all) Where are they making investments?
  - Are institutions seeing a payoff for investments in online degree programs? How are COOs working with marketing departments and services to differentiate their programs?
- **Online Services/Providers:**
  - Revisiting the centralization/integration/outsourcing questions prominent in CHLOE 7 in light of increased federal interest in a wider range of “Third Party Servicers”
- **Teaching & Design**
  - How are faculty responding to the demand of teaching in multiple modalities? And how are institutions supporting them?
  - Are IDs being better-utilized to streamline online design processes? Are they involved in evaluating design quality for online courses?
  - How are institutions meeting RSI requirements? What are they doing to evaluate the level/helpfulness of instructor-student interaction?
- **Online Students & Student Support:**
  - How are COOs determining the support needs of online students? How are they evaluating the efficacy of their current efforts?
  - Are institutions specifically categorizing/differentiating students as online students or on-campus students?

# TOPIC IDEAS? Feedback?

Email us at:

[Research@qualitymatters.org](mailto:Research@qualitymatters.org)



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## CHLOE 6 - 8

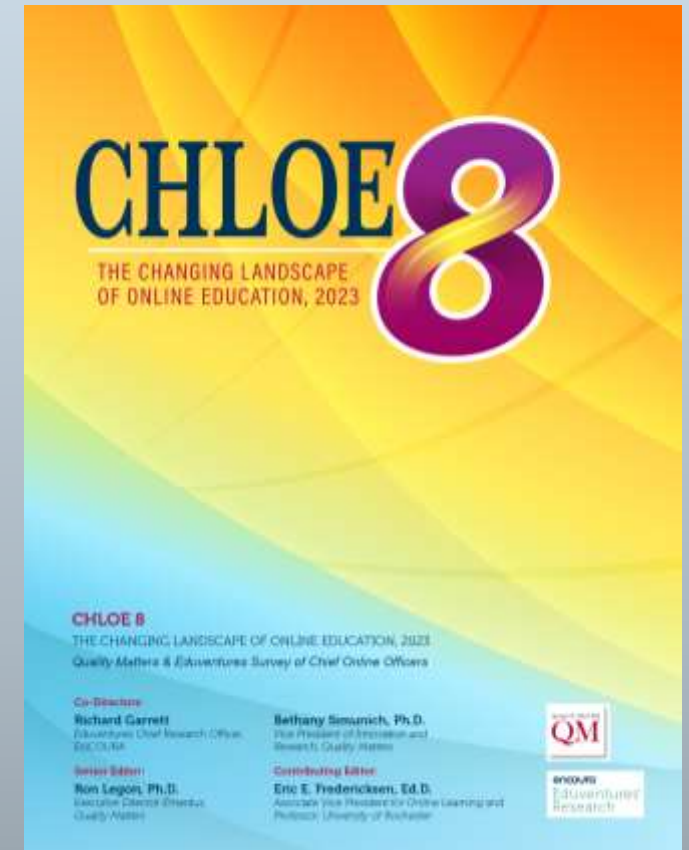
**Jill Buban**, EdAssist Solutions  
**Andrea Jones-Davis**, CourseGateway at EDUCAUSE  
**Connie Johnson**, Colorado Technical University  
**Chris LaBelle**, University of Michigan – Ann Arbor  
**Arletha McSwain**, Central State University (OH)  
**Tina Parscal**, Colorado Community College System  
**Jeff Seaman**, Bay View Analytics  
**Peter Shea**, SUNY - Albany  
**Sasha Thackaberry**, Pearson  
**Lori Williams**, Excelsior University

## CHLOE 9 - 11

**Dylan Barth**, Online Learning Consortium  
**Tom Cavanagh**, University of Central Florida  
**Elizabeth Ciabocchi**, Adelphi University  
**Cristi Ford**, D2L  
**Angela Gunder**, Online Learning Consortium  
**Connie Johnson**, Colorado Technical University  
**Valerie Kelly**, Kent State University  
**Tina Parscal**, Colorado Community College System  
**Julie Porosky Hamlin**, MarylandOnline  
**Karen Rege**, Community College of Philadelphia  
**Jeff Seaman**, Bay View Analytics  
**Morris Thomas**, Howard University  
**Lori Williams**, Excelsior University

# Questions? Comments?

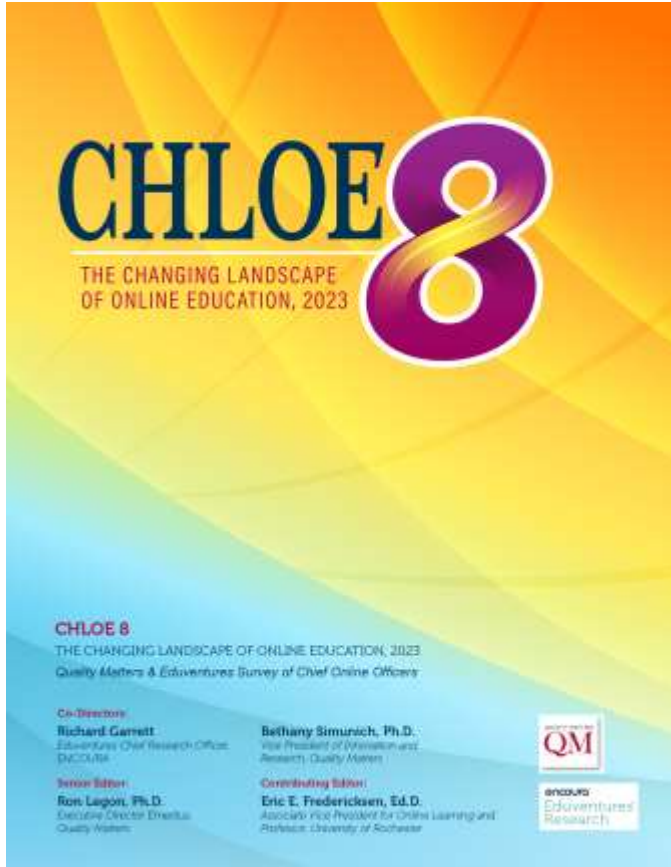
If you're the senior online learning leader at your institution, email us at [research@qualitymatters.org](mailto:research@qualitymatters.org) to ensure you receive the CHLOE 9 survey in 2024!





# **ADDITIONAL RESOURCES**

# Download the CHLOE 8 Report



## CHLOE 8: Student Demand Moves Higher Ed Toward a Multi-Modal Future

Student demand for online and hybrid learning continues to grow, and institutions are working hard to find their footing in this post-pandemic environment.

Download: [encoura.org/chloe8](https://encoura.org/chloe8)



# encoura® Eduventures® Research

## Program Strength Assessment

Are you interested in learning about the demand for your institution, including your Master's programs?

- Benchmark the strength of your program compared to peer institutions
- Determine opportunities to expand your portfolio of program offerings to strengthen the reputation of your institution
- Identify programs that meet market demand as well as programs that face current and future challenges in the market
- Create a focused and distinctive academic portfolio that students are excited about

[encoura.org/PSA](https://encoura.org/PSA)

