CHLOE 4: NAVIGATING THE MAINSTREAM

THE CHANGING LANDSCAPE OF ONLINE EDUCATION, 2020
Quality Matters & Eduventures Survey of Chief Online Officers

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As we publish this report, online learning faces an unprecedented challenge. Hundreds of colleges and universities are suspending face-to-face classes and relying on online capabilities that have spread throughout higher education in recent years to provide continuity of instruction and slow the spread of the coronavirus pandemic. Online managers and staff are tasked to work with faculty to meet this urgent need in a matter of days, not weeks. This response to the crisis is clear evidence that online learning has entered the higher education mainstream, but expectations of what the online infrastructure can achieve in the short run need to be tempered. Mounting successful online courses requires time, effort, and expertise that are likely in short supply under emergency conditions. The immediate goal should be to facilitate communication between faculty and students on the remaining tasks and assignments necessary to complete course requirements, and to help sustain campus communities in these difficult times.

The soon to be released CHLOE 5 Survey will document the online response to the coronavirus emergency.

CHLOE 4: Navigating the Mainstream
The Changing Landscape of Online Education, 2020

INTRODUCTION

Quality Matters, a leading U.S. quality assurance organization focused on online learning, and Eduventures Research, the research division of ACT | NRCCUA and a leading higher education research and advisory company are pleased to bring you the fourth in this series of annual reports. Eric Fredericksen, Associate Vice President for Online Learning, University of Rochester, continues to contribute, with a focus on online learning leaders — the chief online officers (COOs).

Our sample size — the number of COOs participating in our annual survey — has grown each year and now stands at 367 individuals and their institutions. We believe that this growth reflects the spread of the COO role throughout higher education and the increasing visibility of the CHLOE Project itself among online learning leaders. We are also reassured by the corroboration of many of our earlier findings by the larger sample.

The previous CHLOE reports have amply justified our belief that online learning is a mainstream activity at an increasing number of U.S. colleges and universities. As we have shown, organizational structure, policies, and practices at these institutions are adapting to serve the needs of online education, and online education is evolving to accommodate higher education norms. The process of mainstreaming, however, does not follow a single path. We have documented a range of approaches to providing a place for online learning, as chief online officers grapple with established values and practices and new needs, institution by institution.

CHLOE 4 expands our coverage into more areas in which the ramifications of treating online students, faculty, and staff as part of the institutional mainstream are evident and transformative. In aggregate, a picture is emerging of how institutions that have embraced a central role for online learning are creating multiple pathways for it to flourish.

We welcome your comments and suggestions as CHLOE continues to explore the changing landscape of online learning.

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EXECUTIVE SUMMARY

The fourth annual CHLOE (The **CH**anging **L**andscape of **O**nline **E**ducation) report, *Navigating the Mainstream,* presents mounting evidence that online education is increasingly mainstream in the fabric of U.S. colleges and universities, both changing them in the process and being changed by their established culture and practices.

The sample in CHLOE 4 grew by 87 COOs or 31% over CHLOE 3, as participation in the CHLOE surveys continues to increase. With growth in all major sectors, except for-profit institutions, statistical reliability improved, with a margin of error of 5% at 95% confidence. Please see the CHLOE 4 Sample section for further information. Online enrollment, overall, continued to grow in 2019 but not as robustly as in previous years. An increasing proportion of schools report stable, as opposed to increasing, online enrollment.

CHLOE continues to divide the sample for analysis in various ways: By degree level (two-year and four year); by control (public, private nonprofit, and for-profit), by online enrollment headcount (large = >7,500 fully and partly online students, mid-sized = 1,000 to 7,500, and small = <1,000); and by multi-factor institutional types (community college, all four-year low-enrollment, regional public, regional private, and enterprise institutions). This year, growing participation by flagship institutions enabled the addition of this category.

Major themes of the CHLOE series are expanded and updated in this report, including online enrollment trends, course design, finances, support services, organizational structure, and leadership. This edition gives added attention to student orientation, prior academic credit, proctoring practices, accessibility, required faculty training, centers for teaching and learning technology (TLTs), and the growing use of online program managers (OPMs).

CHLOE 4 presents the most thorough description of the COO role thus far, distinguishing areas of primary responsibility and of co-responsibility. Between the two categories, virtually all the institutional functions to build and maintain a successful online presence are covered. Sixty-one percent of COOs reported that their areas of responsibility were expanding. Report lines mirror earlier findings, with more than 75% indicating a primary report line in academic affairs. CHLOE 4 also explored collaborative relationships within the administration and documented a peer working relationship between 61% of COOs and their institution's chief information officer.

Earlier findings that online support services tended toward centralization were refined in CHLOE 4. Most such services are addressed in units serving both on-ground and online populations, but, in 20-30% of cases, a number of services that tend toward decentralization, such as student recruitment, orientation, and advising, are separately administered for online students.

The 2019 survey found a substantial increase in the proportion of COOs reporting one or more current OPM contracts (broadly defined)— a doubling of the percentage since our 2017 survey from 12% to 24% — with flagship and regional private institutions being the heaviest users. The survey yielded a more comprehensive inventory of OPM tasks than found previously. While student marketing and recruitment continue to be the most common functions, half of COOs that use online program management providers in some fashion report OPM involvement in online course and program development.

Given the known difficulties of students adjusting to online study, we considered the figures for required online student orientation — ranging from 10% (at flagships) to 49% (at regional privates) — as surprisingly low. A higher proportion of respondents judge their online courses and services to be "fully accessible," but the lack of a common definition of the term suggested much more variable accessibility in practice.

Required preparation of faculty members to teach online was reported by 60% of our sample — most commonly at community colleges and four-year low online enrollment schools, but least common at flagships and, surprisingly, enterprise institutions. The near universal presence of teaching, learning, and technology centers in our sample (78% reporting one or more), highlights a key service in the preparation of faculty at schools that do not require formal training and a vital supplement elsewhere.

The influence of faculty on the development and delivery of online learning is evident in the composition of councils and committees dedicated to online issues. Sixty-two percent of COOs report the presence of such panels, and 90% of these include faculty members — by far the highest proportion of any stakeholders. These bodies are largely advisory but have the greatest influence on policy issues affecting online development, quality assurance, faculty training, and online student-related policies.

CHLOE 4 confirms the findings of the earlier reports that fully online courses and programs dominate over blended ones at all institution types except community colleges. Enterprise level institutions — those that are already the largest — report the most aggressive plans for program expansion. The widespread practice of awarding credit for prior academic work is explored in this report for the first time.

CHLOE 4 corroborated earlier findings on whether online education is seen as a net generator of revenue (47%) or a net cost (26%) and on the distribution of online revenue — most often folded into a general revenue distribution process to meet institutional priorities. A third of COOs acknowledged only limited understanding or none regarding the costs of online programs and services and comparable on-ground costs. The more confident a COO is that they understand costs, the more likely they are to consider online a net revenue generator. Consistent with the earlier surveys, online tuition mirrors on-ground tuition rates at most institutions. Among the exceptions, lower online tuition is most common in high-priced four-year private institutions, and higher tuition is most common in low-cost community colleges. Online fees present a more mixed picture than can be easily summarized.

CHLOE 4 confirmed and expanded on earlier findings regarding the course development process as largely internal, with heavy dependence on faculty and less consistent involvement of instructional design specialists. Schools offering lower tuition, however, appear to rely on design expertise to assure corresponding efficiencies in online instruction. The range and balance of reported learning activities confirm and expand upon the pattern identified in CHLOE 3, with roughly 50% of student engagement focused on interacting with the learning materials.

Open-ended questions about both institutional and COO goals yielded a familiar list of challenges for online learning. The top three goals include program expansion, enrollment growth, and quality enhancements.

Looking ahead, the CHLOE 5 Survey and report will depart from the broad coverage of CHLOE 4 and its predecessors to focus on the market for online education and assemble data to answer the critical question: Is there still potential for ever-more schools to benefit from major investment in fully online offerings, or is slowing year-over-year online enrollment growth an indication that the market is becoming saturated?

THE CHLOE 4 SAMPLE – GROWTH, DIVERSITY, AND STATISTICAL RELIABILITY

The CHLOE project seeks to illuminate the mainstreaming of online learning across U.S. higher education. This is done through a survey of chief online officers (COOs), the generic title for the most senior institutional leader to oversee the modality, in some respect, at colleges and universities. Contact lists curated by the CHLOE team, as well as lists purchased from specialist sources and contacts obtained from requests to complete the survey, are used to build the sample.

The size of the CHLOE survey sample is an important gauge of the representativeness of the analysis. The sample has grown over time, as the project has become better known. Table 1 shows the CHLOE sample since inception.

Table 1. Sample Growth over Four Years of CHLOE

Year	Public 2Y	Public 4Y	Private 4Y	For-Profit	TOTAL
CHLOE	34	30	40	0	104
CHLOE 2	55	61	59	7	182
CHLOE 3	76	91	98	11	280
CHLOE 4	99	135	123	8	366*
% Increase CHLOE 4 vs. CHLOE 3	30%	48%	26%	-27%	31%

The CHLOE 4 sample also included one two-year private institution
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020.

The first CHLOE Survey was distributed in 2016, CHLOE 2 in 2017, CHLOE 3 in 2018 and CHLOE 4 in 2019. The sample continues to broaden coverage of the three largest sectors of higher education, in terms of student enrollment: public two-year, public four-year, and private nonprofit four-year. The public four-year sample increased by almost half, indicative of the burgeoning of online education in that segment. For-profit schools remain significantly underrepresented in CHLOE 4, despite that sector's still outsized presence in the online market. Special outreach efforts, and the addition of a section of the survey dedicated to for-profit matters, have elicited little response.

How does the CHLOE 4 sample compare to American higher education as a whole? Table 2 offers some perspective.

Table 2. The CHLOE 4 Sample vs. U.S. Higher Education

Sector	Public 2Y	Public 4Y	Private 4Y	For-Profit
Institutions	22%	17%	36%	22%
Total Enrollment*	28%	45%	21%	5%
Online Enrollment**	28%	44%	18%	10%
Fully Online Program Enrollment*	24%	32%	19%	19%
CHLOE 4 Sample	27%	36%	34%	2.2%
DIFFERENCE between CHLOE 4 Sample and Online Enrollment*	-1 percentage point	-8 percentage points	+16 percentage points	-8 percentage points

Row totals exclude the small number of degree-granting institutions that fall outside these sectors.
*Undergraduate and graduate students combined.
**Fully online students and those taking one or two online courses as part of an otherwise campus-based experience- undergraduate and graduate combined.
Source: IPEDs 2018 is the source of this Institutional and enrollment data.

A count of institutions emphasizes the large number of four-year private nonprofits, and the relatively small number of public four-year equivalents. Student enrollment distribution produces a different picture: public four-year schools make up only 17% of institutions but enroll 45% of students, while private four-year schools, 36% of institutions, enroll only 21% of students. The for-profit disparity is even more striking. Only public two-year schools have a similar institutional and enrollment share.

Online enrollment may be divided into students enrolled in fully online programs and students enrolled on campus that take one or more online courses. When it comes to the former, the public four-year share drops to 32%, and the for-profit share climbs to 19%. As noted above, four-year publics are still under-represented in the fully online program market, compared to their share of overall enrollment, and for-profits are over-represented, even as the imbalance continues to moderate. Public four-year institutions are more prominent with respect to total online enrollment, courses, and programs, where their share almost matches their share of total enrollment. For-profits, on the other hand, shrink in significance when total online enrollment is considered.

Share varies much less between total enrollment, total online enrollment, and fully online program enrollment for public two-year and private four-year nonprofit schools. This is consistent with the mainstream character of online education at most community colleges and the diversity of private nonprofits, some of which have wholeheartedly embraced online while others have few or no online offerings.

Overall, the CHLOE 4 sample is a good match for public two-year schools, in terms of proportion. The presence of public four-year institutions sits between that sector's share of fully online program students (32%) and total online and total enrollment (44% and 45% respectively), which also suggests decent representation. Private four-year nonprofits, 34% of the CHLOE 4 sample, are well represented in terms of institutional count but overrepresented enrollment-wise. For-profits are very much underrepresented.

Table 3 reviews the CHLOE 4 sample by online enrollment scale. In fall 2018, the most recent year where comprehensive data is available, U.S. higher education enrolled about 2.3 million fully online undergraduates, about 13% of the total, and an additional 3.4 million enrolled in one or more online courses as part of an otherwise campus-based experience. At the graduate level, fully online study accounted for 31% of the total, and "some online" for another 9%. All these ratios have climbed over time. At the institutional level, however, online enrollment scale, whether fully or partially online, varies widely, as represented in the CHLOE 4 sample.

Table 3. The CHLOE 4 Sample by Online Student Headcount

CHLOE 4 Sample	Large >7,500	Mid-Sized 1,000-7,500	Small <1,000
Schools by Number of Fully Online Students	9	121	223
% of CHLOE 4 Sample	2.5%	33%	61%
Schools by Number of Partially Online Students	21	142	178
% of CHLOE 4 Sample	5.7%	39%	49%
Schools by Number of Fully and Partially Online Students	34	198	124
% of CHLOE 4 Sample	9%	54%	34%

Rows do not add up to 100% because they exclude a small proportion of CHLOE 4 respondents who have zero fully and/or partially online students.
Source: IPEDS fall 2017. A handful of CHLOE 3 respondents reported zero fully and partially online students to IPEDS for fall 2017. Not all sample schools enroll both fully and partially online students.

As online education has mainstreamed, a small proportion of schools have achieved enrollment scale, but the vast majority report more modest, if growing, enrollment. Scale is easier to achieve if the measure is students who take a course or two online rather than an entire program. The rows in Table 3 do not add up to 100% because they exclude a small proportion of CHLOE 4 respondents who have zero fully and/or partially online students.

As in prior years, this CHLOE Report looks at the sample as a whole, by sector (public two-year, public four-year, private nonprofit four-year), and by online enrollment scale. Some sections continue the effort in CHLOE 2 and 3 to characterize major institutional types defined by multiple factors. This year, increased participation has allowed us to add a sixth type – the flagship university. The list is as follows:

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

- **Flagship:** the leading four-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

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

- **Regional Private:** four-year private nonprofits with between 1,000 and 7,500 fully and partly online students

- **Low Enrollment:** four-year public and private nonprofits with fewer than 1,000 fully and partly online students

- **Community College:** two-year public institutions with fewer than 7,500 fully and partly online students

Statistical Reliability

The larger CHLOE 4 sample, 367 institutions, means a smaller margin of error. Findings based on the entire CHLOE 4 sample, with a 95% confidence level and a population of 4,517 U.S. degree granting postsecondary institutions as reported in IPEDS for the year 2018-19, have a margin of error of 5%. This compares to a 10% margin of error for the first CHLOE survey, 7% for CHLOE 2, and 6% for CHLOE 3.

THE ROLE OF THE CHIEF ONLINE OFFICER

The chief online officer (COO), by whatever title, plays an increasingly important role in colleges and universities. The growth of online education, and strategic value for many institutions, underscores the importance of this academic officer. Consistent with prior studies, CHLOE 4 explored a number of dimensions related to the role of chief online officer and developed a deeper understanding on issues related to the position.

Growth in Number of COO Positions

In CHLOE 3, we captured information about the creation of the chief online officer position. Respondents to that study indicated substantial recent growth in the number of COO positions. Of the 280 institutions reporting in CHLOE 3, 110 of those had created the COO position since 2008.

In CHLOE 4, we again inquired about when the COO position had been established. While 15% of the positions were created before 2000, the broader prominence of the role is relatively more recent, with 33% being created between 2010 and 2014 and 30% of the COO positions being created between 2015 and 2019. Basically, five out of eight positions were developed in the past decade (Figure 1).

Figure 1: Year the COO Position Was Created (percentage of total)
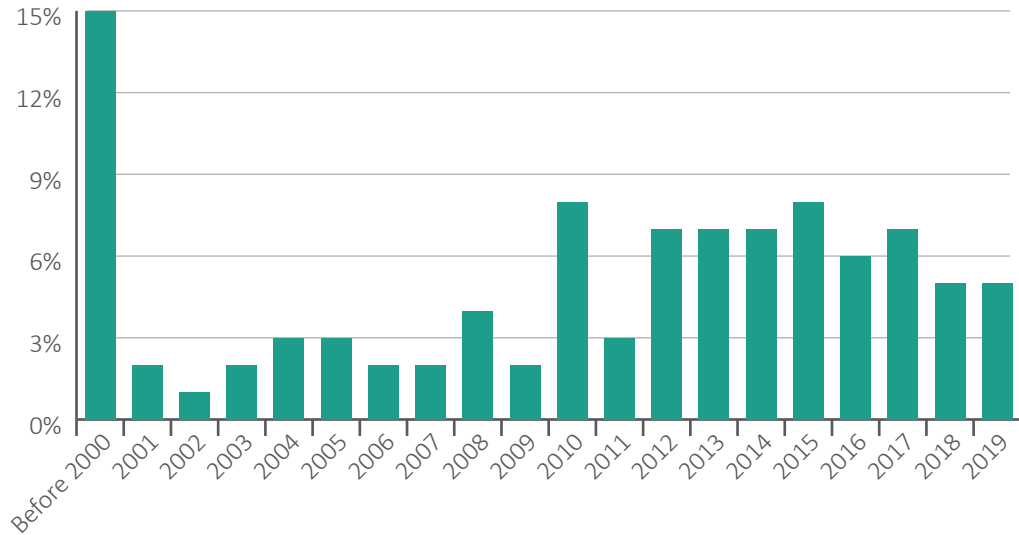
Among the 367 institutions represented in the CHLOE 4 Survey, only one appears not to have an officer with the range of duties that define a chief online officer. This is, perhaps, not surprising since only the COO or their designee is eligible to complete the CHLOE Survey. Of the remaining 366, represented in Table 2, the pace of establishment of such positions has accelerated over the past 20 years. The steady growth since 2000 and the surge in creation of such positions in the past decade is striking evidence of the establishment of this administrative role among institutions invested in online learning. What it cannot tell us is the extent to which all U.S. higher education institutions mirror this growth, though the size and breadth of the CHLOE 4 sample, while still far from comprehensive, strongly suggests that the COO role is increasingly mainstream.

Figure 2: Growth in Proportion of Institutions with a COO (CHLOE 4 Sample)
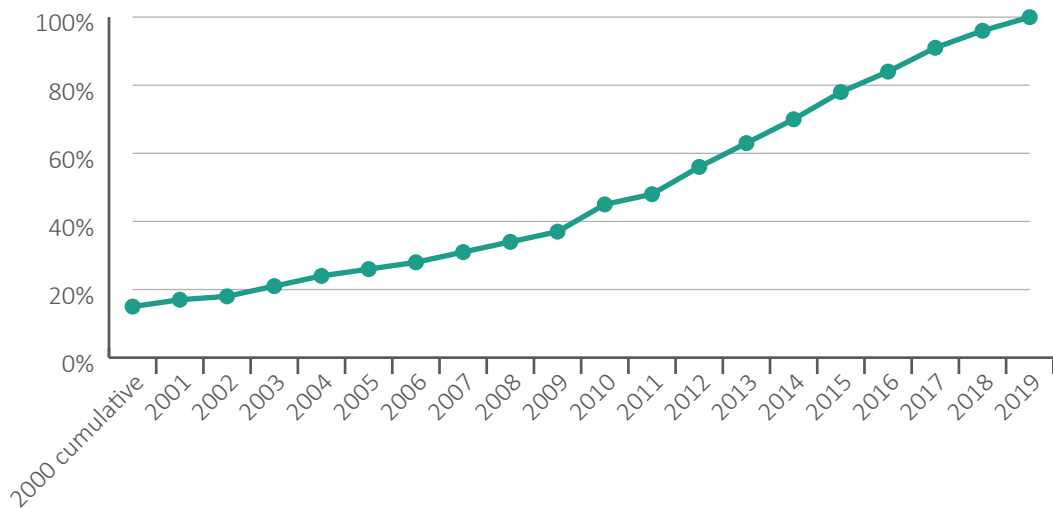
In CHLOE 4 we also updated our picture of when the COOs in our current sample were appointed. The majority (59%) of COOs were selected between 2015 and 2019, and 30% were selected between 2010 and 2014, following the pattern of position creation. Almost nine out of 10 of current COOs were hired in the past decade (Figure 3). While the current CHLOE sample of institutions has reached saturation with regard to presence of a COO, higher education as a whole is likely much further behind, and we anticipate further growth in COO positions across U.S. institutions in the coming years.

Figure 3: Year in which Current COOs Were Appointed (CHLOE 4 Sample)
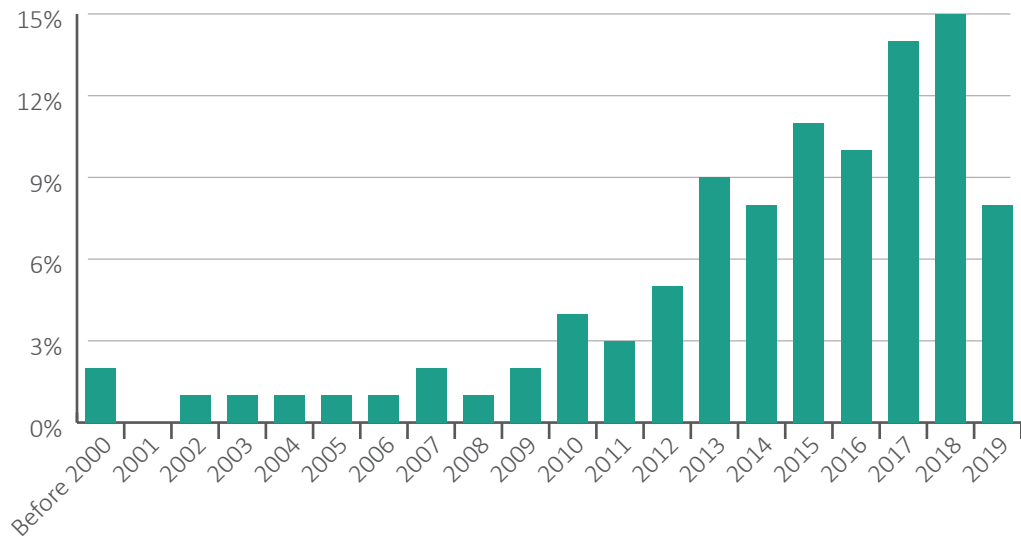
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

What does the assumption of a relatively new role with a new leader suggest? Perhaps these point people need opportunities to connect with each other. They might also value support and development from professional organizations, and we have noticed national groups such as Quality Matters, the Online Learning Consortium, University Professional and Continuing Education Association (UPCEA), and others, responding to this opportunity.

COOs Promoted from Within or Recruited

In CHLOE 4, we inquired about the recruitment of the chief online officer. Across all institutions, the majority (61%) were appointed from within the school, and 39% were recruited from outside. This result is almost identical to the responses in CHLOE 3 last year. Most sectors did not deviate significantly from this 60:40 pattern of internal versus external recruitment of COOs, but flagship campuses (80%) and enterprise institutions (77%) reported significantly higher proportions of internal hires.

We might speculate that the preponderance of COO appointments from within highlights the many instances in which COO candidates having a solid understanding of the institution and established relationships with faculty and administrators across the schools is of paramount importance. Of course, with almost two out of five responses reflecting outside recruitment, this might suggest that, in some institutions, prior experience elsewhere and a fresh perspective might be seen as of greater value.

COO Reporting Relationships

Consistent with the previous CHLOE surveys, CHLOE 4 found that most COOs report to academic affairs. Two hundred and nine or 57% indicated that they report directly to the provost or chief academic officer (CAO), and 118 or 32% indicated that they report to another academic affairs administrator.

This would seem to indicate that 89% of the sample reports to an academic officer, but, since it was possible for respondents to indicate more than one report line, a number appear to have done so. We can be certain of this, because 366 individual COOs indicated a total of 412 report lines or 113% of our sample. Further complicating any detailed analysis is that, in comments, a small number of COOs indicated that they wear several of these administrative hats simultaneously. Nevertheless, it is clear that more than 75% of the COOs we polled report to and through academic affairs.

We also asked about relationships among executive officers of the institution, other than direct report lines. Respondents were able to identify collaborative peer-to-peer roles. Of particular interest was that 61% of COOs in our sample have a collaborative peer-to-peer relationship with the CIO. This finding underscores the important dependency of the COO on the IT organization to provide a solid and robust learning management system platform and tools for online learning. Given this context, it is, perhaps, more concerning that 39% of COOs indicated that they do not have any particular relationship with the institutional CIO.

Overall, we believe the alignment of online learning within traditional academic administration clearly reflects the mainstreaming of these offerings in higher education.

Functions of the COO – Lead vs. Shared Authority

In the CHLOE 3 Report, COO responsibilities were divided into two categories: Those that more than nine out of 10 COOs reported as part of their portfolios and those listed by more than three quarters of the COOs in the sample.

Table 4: COO Responsibilities as Reported in CHLOE 3

More than 90% of COOs listed:	More than 75% of COOs listed:
Online faculty training	External representation
Instructional design for online courses	Budgeting online functions
Coordination with academic units	LMS support/administration
Online policy development	Regulatory compliance
Online quality assurance	Contracting with external providers
Online course development	Orientation of online students
Strategic planning	Selection of LMS and online tools
	Data gathering and reporting
	Online support services
	Online program development
	Online technical support
	Accessibility

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

In CHLOE 4, we took a different approach. COOs were asked to indicate those responsibilities in which they considered themselves the lead officer, which we label as "core responsibilities" and those in which they shared responsibilities with other administrators, which we identify as "co-responsibilities." Table 5, below displays this breakdown for those responsibilities listed by 49% or more of the COOs in our sample.

Table 5: COO Core and Co-Responsibilities

(49% or More of COOs Reporting)

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

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

We regard the list in Table 5 as the most comprehensive picture of COOs' responsibilities that CHLOE has assembled thus far. Overall, we believe this broad portfolio of duties is noteworthy. The core responsibilities correspond to a set of functions critically important to the functioning of online programs and that may be managed separately for the online population without adversely affecting other populations in the academic community. While most of the co-responsibilities have a high impact on online students, faculty, and staff, they are more difficult to disentangle from the same services as performed for the entire population of the institution; hence, the need to co-manage these services to the benefit of all. The range of duties in these two lists speaks to the need for a seasoned leader with a variety of experiences. In order to be prepared to be successful in this role, the COO will benefit from the development of skills in multiple areas in the functions and organization of their institution.

Are COOs Gaining More Responsibility?

In CHLOE 4, we inquired about potential changes in the responsibilities of the COO. The clear majority (61%) of COOs report that their duties are increasing, 35% are stable, and only 4% of COOs reported that their responsibilities are decreasing (Figure 4).

Figure 4: Growth in COO Responsibilities (percentage of total)
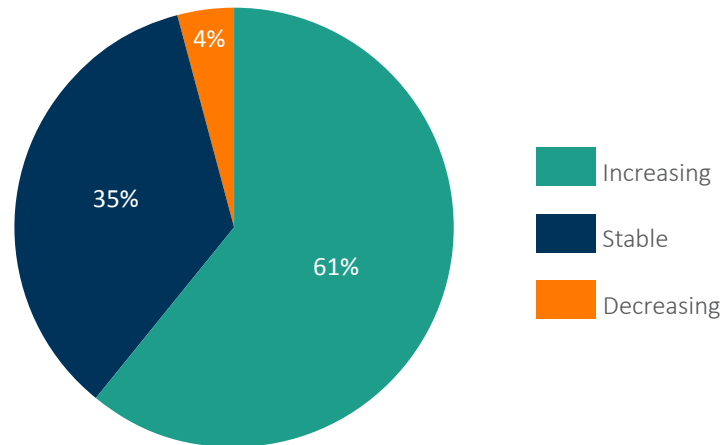
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

If we look at the comparable figures by sector, we find that most of them differ by only a few points from the sample as a whole. The exceptions are (1) regional four-year private institutions in which 68% see COO responsibilities increasing and (2) flagship institutions in which 70% of COOs see this trend. It may be the case that these sectors are relatively newer entries into the online field, and are still scoping out the appropriate role for their online leaders.

SUPPORT SERVICES FOR ONLINE STUDENTS AND FACULTY

It has long been recognized that the typical online student's success depends on more than effective pedagogy, engaging teaching, and reliable technology. Institutional staff must also support online students with services provided remotely and be capable of addressing the unique challenges of studying online and relating to the institution at a distance. Faculty, too, place different demands on support staff as they strive to master new technology, adapt their teaching techniques to the online medium, develop effective digital content, and adjust to new online policies.

Previous CHLOE surveys have built an inventory of support services impacted by the rise of online learning that, in turn, have played a role in building and delivering online programs. Past CHLOE reports have also addressed some support issues in greater depth, such as instructional design support for course development, the use of online program managers (OPMs), and the quality assurance of support services.

Central versus Distributed Control of Support Services

CHLOE 4 asked COOs to assess the degree to which support services for online students, faculty, and programs are handled separately from those that support analogous on-ground functions or are handled by units serving the entire institution. The survey questions approached the issue from several directions (i.e., measuring the extent of centralized vs. distributed management of support services and assessing the frequency with which support services, individually and collectively, are organized to serve online needs exclusively).

In their overall assessment, nearly a third of COOs report a balance of centralized and distributed functions, but the scale tilts toward centralization when we compare the 47% of institutions that reported "highly centralized" or "majority of functions centralized" versus the 21% of institutions that reported "highly distributed" or "majority of functions distributed" (Figure 5).

Figure 5: Positive Impact of Centralized vs. Distributed Management

Centralization vs. Distributed Management: Which is more likely to have a positive influence on the issues listed below?

All Respondents

Legend:
- Highly centralized
- Majority of functions centralized
- Balance centralized / distributed
- Majority of functions distributed
- Highly distributed
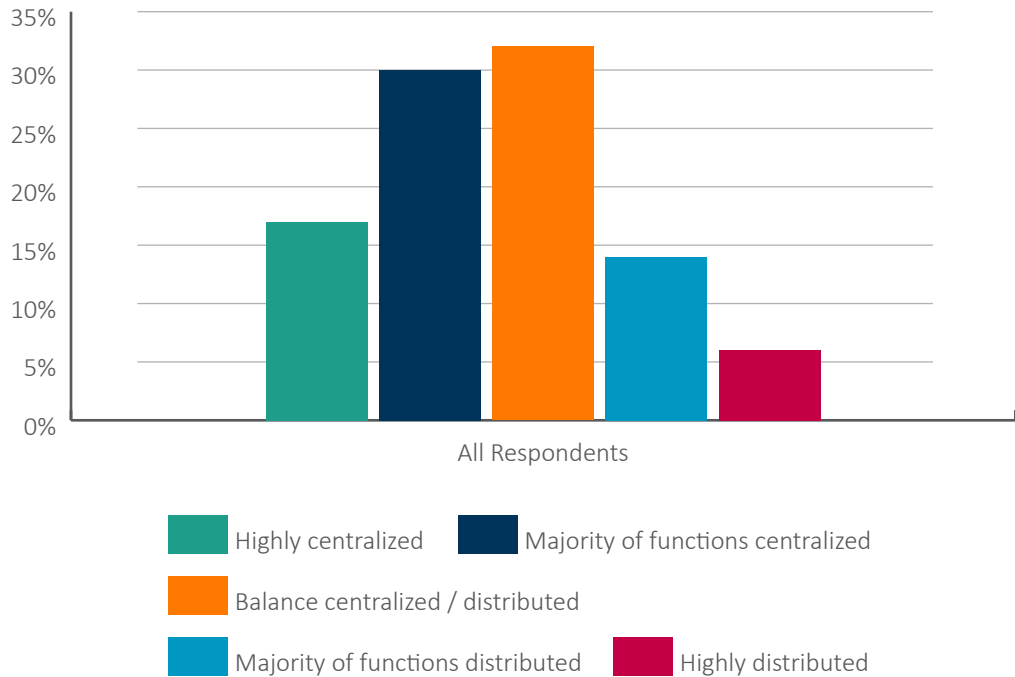
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

When we aggregate the respondents' more detailed assessment regarding the degree of centralization in each of 23 support functions that impact online students and faculty (Table 6), we see an even stronger tendency toward centralization, with 71% of institutions reporting such services as "fully" or "mostly" centralized and serving both online and on-ground populations, 16% judging support services to be "mostly" or "fully" separate, and 10% reporting a mix or "balance" between these extremes.

Table 6: Centralization of Support Functions (CHLOE 4 Sample)

For each of these support services, indicate whether they are managed centrally or distributed across the institution.

	Service Units	Fully or Mostly Centralized	Fully or Mostly Separate	A Balanced or Blended Approach
1.	Library Services	91%	3%	6%
2.	Financial Aid	91%	3%	5%
3.	Credit Transfer	87%	6%	5%
4.	Book Store Ordering & Services	85%	8%	5%
5.	Billing	85%	3%	4%
6.	Registration & Records Access	84%	8%	5%
7.	Help Desk & Technical Support	80%	9%	9%
8.	Accessibility & ADA Compliance	80%	8%	11%
9.	Student Admissions	78%	14%	5%
10.	Course/Section Schedule	74%	15%	9%
11.	Technology Selection & Contracts	71%	11%	15%
12.	Instructional Design Support	68%	18%	10%
13.	Faculty Training/ Development	68%	17%	13%
14.	Advising	68%	20%	11%
15.	Faculty Recruitment	65%	19%	12%
16.	Tutoring	63%	22%	10%
17.	Open Educational Resources (OER)	62%	16%	19%
18.	Student Recruitment	59%	24%	14%
19.	Proctoring & Student Authentication	57%	29%	8%
20.	Coaching/Mentoring	57%	19%	15%
21.	Student Orientation	55%	30%	10%
22.	Program Marketing	54%	26%	15%
23.	Program Planning	53%	28%	15%
	AVERAGE FOR ALL LISTED SUPPORT SERVICES*	71%	16%	10%

* 1-5% of respondents indicated that a particular service did not apply to their institution.
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

We appreciate that every institution is unique and respect the different cultures and organizational models and approaches in U.S. higher education. That said, this data about centralized versus distributed management do seem to suggest tendencies and preferences for the oversight of online learning operations. Generally, higher education institutions favor a centralized management approach, and this rings true in most specific operations or functions. There is, in addition, a concomitant inclination to serve diverse needs and populations in an integrated way within units initially designed to serve traditional academic offerings and operations.

The most commonly centralized services at the top of the Table 6 ranking are the least likely candidates to be handled in separate units dedicated to the online aspects of an institution. In some cases, centralization is justified by concerns about consistency in enforcement of government regulations and external accountability (e.g., student records, financial aid administration, and accessibility compliance). In other cases, there are strong arguments for integration and exchange of data between and within information systems, and economies of scale in centralizing an institutional function.

A follow-up question asked COOs' opinion regarding the impact of a centralized versus a distributed approach on a series of institutional activities or objectives. Responses were based on a five-point scale, with "1" strongly favoring a centralized approach and "5" a distributed approach (Table 7). Any score below "3" indicates that the outcome is more likely positive under centralized management.

Table 7: Outcomes Benefit More from Centralized Management

(COO Opinions: 1 = Centralized; 5 = Distributed)

**Is centralization or distributed management more likely
to have a positive influence on the issues listed below?**

Outcome Measure	Average	Median	Mode
Contracting with Product and Service Providers	1.98	1.60	1.00
Cost Control	2.07	1.90	1.00
Consistent Student Experience	2.08	1.80	1.00
Scalability	2.21	2.00	1.00
Accountability	2.42	2.80	3.00
Course and Program Quality	2.44	2.90	3.00
Good Relations between Administration and Faculty	3.01	3.00	3.00

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

As can be seen from the results in Table 7, COOs believe that outcomes improve on all but one of these measures under centralized control. The modal responses (the last column in the table) indicate a strong preference for centralized contracting, cost control, consistency, and scalability, with "1's" being the most common responses. Opinion is more divided on accountability, academic quality, and faculty/administration relations, with balanced responses being most common, but only on the last issue are COOs evenly divided as to which organizational model would yield the greater benefit. This would seem to suggest a belief among many COOs that faculty would favor distributed control to reduce the degree of administrative control.

Separate versus Integrated Management of Online Support Services

Despite this widespread tendency toward centralization of services, the survey revealed a significant proportion of institutions with separate online support services in areas where there are arguably different needs among the divisions of the institution or within special categories of students, faculty, and programs.

Table 8, below, lists the proportion of schools reporting services in each of the surveyed areas. In this display of the data, 15-30% of reporting schools (highlighted in the table) are seen to manage a wide range of online-related functions separately.

Table 8: Incidence of Separate Support Services for Online Students and Faculty

For each of these support services, indicate whether they are separate from services for on-ground programs or integrated

	Support Service	% Separate
1.	Online Student Orientation	30%
2.	Online Proctoring & Student Authentication	29%
3.	Online Program Planning	28%
4.	Online Program Marketing	26%
5.	Online Student Recruitment	24%
6.	Online Tutoring	22%
7.	Advising (for online students)	20%
8.	Coaching/Mentoring (of online students)	19%
9.	Faculty Recruitment	19%
10.	Instructional Design Support	18%
11.	Faculty Training/Development	17%
12.	Open Educational Resources (OER)	16%
13.	Course/Section Schedule	15%
14.	Online Student Admissions	14%
15.	Technology Selection & Contracting	11%
16.	Student Help Desk & Technical Support	9%
17.	Online Registration & Records Access	8%
18.	Book Store Ordering & Services	8%
19.	Accessibility & ADA Compliance	8%
20.	Credit Transfer	6%
21.	Financial Aid	3%
22.	Billing	3%
23.	Library Services	3%

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

The prima facie case for treating online learning separately is particularly strong in these services: Student orientation to online study; remote proctoring and student authentication; online program design, planning, scheduling, and marketing; online student recruitment, advising, mentoring, and tutoring; online faculty recruitment and training; and development of open educational resources (OER).

Within the averages for the entire CHLOE 4 sample in Table 8, however, there was wide variation among the sectors of higher education. Community colleges showed the least tendency (13%) toward distributed control among the highlighted services, while regional privates reported the highest proportion (35%), followed by flagship (29%), four-year low online enrollment institutions (27%) and enterprise institutions (26%).

Among individual services, nearly 50% of regional privates indicated that orientation, proctoring, and authentication are managed separately for online students. The majority of flagship institutions manage online marketing (63%) and online program planning (52%) separately, and community colleges, which generally favor a centralized approach, handle online program planning independently with greater frequency (36%) than the sample as a whole.

So, while the majority of institutions continue to provide these services through central units committed to handling the diverse needs of different clienteles, the creation of separate units bears watching. Will the continued trend toward mainstreaming online learning strengthen the case for separate management or for integration? Future studies will be needed to see if the proportion of dedicated online support units increases, particularly if the growth trend in online enrollment continues.

USE OF ONLINE PROGRAM MANAGERS (OPMS)

After a hiatus in the CHLOE 3 survey, CHLOE 4 returned to the topic of online program managers (OPMs) (i.e., companies, typically for-profit, that provide academic institutions with a wide range of services to facilitate the development and delivery of online programs). In the CHLOE 1 Report (2017), less than 9% of the sample indicated a current OPM relationship. The three most cited uses were marketing, LMS hosting, and enrollment management (student recruitment and retention). The comparable figure in the CHLOE 2 Survey was 12% of institutions with current OPM contracts. To the most commonly cited services provided by OPM users in CHLOE 1, 33% of community colleges working with an OPM and 44% of four-year private nonprofits doing the same added online course development in CHLOE 2

Based on recent press attention to the OPM market and evidence of a diversification of OPM providers and contractual relationships, the CHLOE 4 Survey revisited the issue. The results, summarized in Figure 6, indicate that 24% now have some form of OPM contract. Allowing for some rewording of the relevant questions, and the much larger sample, this still suggests significant growth in OPM partnerships.

Figure 6: Percent of Institutions with OPM Contracts by Sector

**Does your institution rely on Online Program Managers (OPMs)
to provide or manage aspects of online programming at your institution?**

Sector	No- OPM Non-Users	Yes- OPM Users
Community College	85%	15%
4Y Low Enrollment	80%	20%
Regional Public	77%	23%
CHLOE Sample	76%	24%
Enterprise	69%	31%
Flagship	60%	40%
Regional Private	58%	43%

■ No- OPM Non-Users   ■ Yes- OPM Users
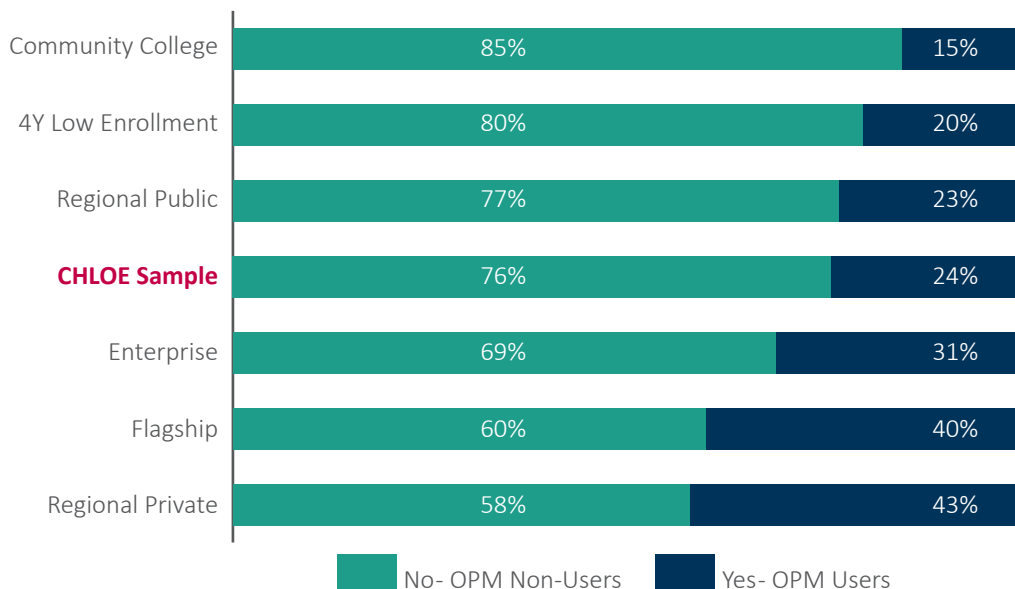
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Using responses from the earlier CHLOE surveys, CHLOE 4 updated a set of rationales from which current OPM users could indicate their reasons for contracting with OPMs. The following picture (Tables 9 and 10) emerged, showing the pros and cons of OPM use.

Table 9: Advantages Cited by COOs for Working with OPMs

**What are your most important reasons for using a third-party service provider(s)?
Rank as many as are relevant to you.**

Reasons to Contract with OPMs Cited by Users	2019 Survey
OPMs have expertise we lack	78%
OPMs can provide rapid scaling	49%
OPMs enable rapid development	48%
OPMs may cover start-up costs	44%
OPMs provide greater staffing flexibility than institutional hiring	30%
OPMs can be held accountable	30%
OPMs can lower long-term costs	26%

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Table 10: Reasons Cited by COOs for Not Seeking OPM Partnerships

(CHLOE 4 Sample as a Whole)

**List as many reasons as apply why [you] do not rely on
OPMs or other service providers.**

Reasons to Avoid OPMs Cited by Non-Users	2017 Survey	2019 Survey
We can meet needs internally	51%	57%
Concern about upfront costs	35%	48%
Revenue share is unattractive	53%	46%
Insensitivity to our culture	NA	34%
Preference for limited scope, fixed-cost contracts	34%	32%
Unrealistic ROI claims	12%	29%
Doubts about effectiveness	29%	24%

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

One imagines these different perspectives contending over the strategic choice to commit to OPM contracts and partnerships in hundreds of institutions faced with the challenges of growing and supporting their online initiatives.

Community colleges show the lowest incidence (15%) of OPM usage. The reasons most frequently cited by community college COOs for not engaging with an OPM are "sufficient *internal* capability to meet program needs," "concerns about upfront costs," "OPM lack of institutional knowledge," and "concerns about long-term revenue sharing." In text responses, a number of COOs shared the perspective that OPMs are not on the planning horizon for most community colleges. This attitude may directly or indirectly reflect the views of OPM providers that the two-year sector, with low tuition rates, undergraduate-only programs and, often, marginally prepared students, presents a limited opportunity for their business model.

At the other end of the spectrum, four-year regional privates (43%) and public flagships (40%) in the CHLOE sample are the most likely sectors to rely on OPM providers to handle critical tasks. Their COOs cite these advantages of partnering with an OPM: providing "expertise we lack," assuring "scalability" and "rapid development," and covering "start-up costs."

CHLOE 4 updated the inventory of common OPM functions. In Table 11 the list of functions, albeit somewhat overlapping in places, covers a wide range of essential activities. In text responses, the only function cited by a respondent that was not specifically covered in the listed OPM services was tutoring for online students, though this could be subsumed under "coaching and mentoring."

Table 11: Relative Frequency of Tasks Undertaken by OPMs

(Responses of OPM Users in the CHLOE 4 Sample)

For the following functions at your institution, in connection with fully online students, please indicate the current role, if any, of third party service providers.

Function	% of OPM Users
Marketing online programs	73%
Market research	71%
Recruiting online students	65%
Mentoring and coaching online students	57%
Online student retention	57%
Accessibility compliance	54%
Advising online students	53%
Assisting faculty and staff in building online and/or blended programs	52%
Other regulatory compliance	51%
Managing the online teaching & learning environment (LMS)	50%
Building online courses	49%
Assisting faculty and staff in building online courses	49%
Building online and/or blended programs	47%
Student authentication	43%
Proctoring online and/or remote assessments	42%
Arranging clinical practice sites	20%

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

With increased evidence of OPM usage and changes in the OPM industry itself, CHLOE will continue to monitor and report on this evolving market in the future.

PREPARING STUDENTS FOR ONLINE STUDY

While studies abound on whether or not online college students are performing as well as on-ground students, and observers inside and outside academia offer widely different opinions (see CHLOE 3 Report, pages 38-39, summarizing COO opinions that online student results are comparable to on-ground at most four-year institutions), there has been little attention to how institutions are preparing students for online learning. CHLOE 4 asked COOs whether their institutions require online students to enroll in orientation prior to or concurrently with their first online courses. The results (Figure 7) indicate that such orientation is optional or absent in nearly 70% of institutions in the CHLOE sample.

Figure 7: Online Student Orientation Practices by Sector

Is student training/orientation to online learning prior to or concurrent with their first online course, required, conditionally waived, or optional?
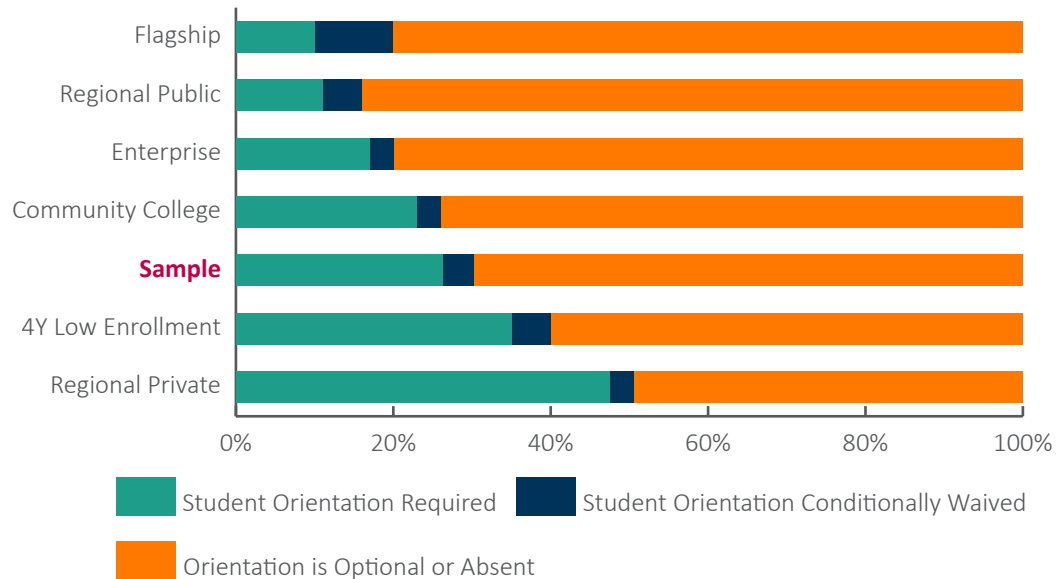
Source: *Eduventures Research and Quality Matters, CHLOE 4, 2020*

Among different sectors, four-year regional publics (16%), enterprise programs (20%), and flagship public institutions (20%) report the smallest proportion requiring such orientation, and four-year regional private institutions the largest (49%). Community colleges fall between these extremes (26%).

From text comments intended primarily to explain the institutional stance on orientation, we learned more about common practices in preparing students for online study. Some institutions require online orientation for some categories of students (e.g., new undergraduates) but not all. Others point to measures short of formal orientation, including orientation modules built into credit-based online courses, requirements for online instructors to orient students to their courses (methods unspecified), or student-initiated one-on-one meetings with support staff on an as-needed basis. One response points to a video on the subject available to students, adding that there was "not really any need for further training." A number of COOs say simply that no structured orientation to online study is offered at their institution.

The CHLOE 4 Survey did not specifically solicit comments on the rationale behind decisions to require orientation to online study or not. Should higher education's spotty performance in assuring that online students are prepared for the mechanics, discipline, etiquette, etc., of online learning be a matter of concern? Do students growing up in the digital age require as much coaching as the previous generation of online learners? And what about older students who populate both undergraduate and graduate online programs? Are institutions that express dissatisfaction with online student outcomes (e.g., the majority of community colleges) doing enough outside the online classroom to maximize student performance?

If we compare student outcomes by sector from CHLOE 3 to the presence of an online orientation requirement by sector in CHLOE 4 (Table 12), the effect of required orientation on student performance shows mixed results.

Table 12: Relationship Between Required Orientation and Student Outcomes by Sector

(The last three columns should sum to ~100%)

Institution Type	CHLOE 4 % Requiring Online Orientation	CHLOE 3 Online Perform Better	CHLOE 3 Online Equal to or Better than On-Ground	CHLOE 3 Online Perform Worse
Regional Private	51%	25%	44%	31%
4Y Low Enrollment	40%	67%	33%	0%
Sample	**30%**	**11%**	**54%**	**35%**
Community College	23%	3%	40%	56%
Flagship	20%	NA	NA	NA
Enterprise	20%	11%	74%	16%
Regional Public	16%	13%	81%	6%

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

In this comparison, sectors that are above the sample average in requiring online orientation (Regional Private and four-year Low Enrollment) show the highest percentages of online students out-performing on-ground students. On the other hand, enterprise programs, and regional publics, which seldom require online orientation, report the strongest overall online student success. Clearly, there are other factors than orientation at play in influencing overall online student success (e.g., the level of faculty preparation, quality course and program design, online advising, mentoring and tutoring, and student selectivity). More study of the role of online orientation is needed to determine its impact among an array of factors and whether it plays a critical role in student success.

ONLINE ACCESSIBILITY: A WORK IN PROGRESS

Another topic related to student support for online students and their instructors is the extent to which online courses, programs, and support services are accessible. CHLOE 4 asked COOs whether their online programs and support services were "fully accessible," "partially accessible," or "widely variable" with regard to accessibility. No option to respond as "not accessible" was provided, since we did not expect any respondent to flatly state that accessibility was not a priority, nor did even a single comment suggest that this was the case. Accessibility has become a universal commitment in U.S. higher education. In light of this commitment, it is, perhaps, more significant that over 40% of the CHLOE sample acknowledged that they currently fall short of achieving full accessibility than the nearly 60% that claimed to have already reached this goal (see Figure 8).

Figure 8: How Accessible Are Online Courses and Programs by Sector

Are [your] online courses and support services fully accessible?
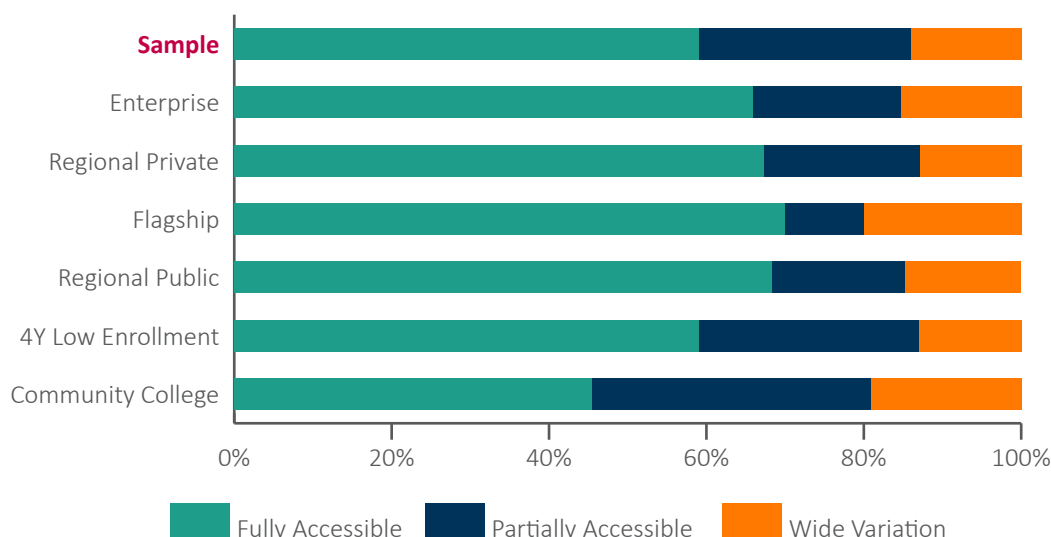
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

In comments to explain the latter two choices – "partially accessible" or "wide variation" — some respondents were careful to identify accessibility law, guidelines, and practices they had in mind in making this determination, but many did not. Judging by what was said and left unsaid, accessibility can mean providing screen reading software and running course content through software, such as Ally, to screen for and correct or recommend revision of inaccessible elements. Alternatively, it may mean a commitment to conduct course-by-course staff reviews based on WCAG or UDL guidelines or institutional interpretations of ADA and Section 508 rules.

Some institutions report offloading some responsibility to provide accessibility by contracting with organizations to caption or transcribe video, provide alternative text, etc., and/or rely on publishers to certify the accessibility of their products. Most also encourage or require faculty members (sometimes trained, sometimes not) to implement accessibility in their courses and monitor the results.

Institutions combine the above approaches within their resources and in accordance with the relative priority assigned to accessibility. The fallback for most partially compliant institutions is to rely on rapid accommodation of individual student accessibility requests through interventions by specialized staff in dedicated accessibility units.

With such variability, we can readily agree with a number of comments we received asserting that full accessibility does not exist — there is always more that can be done — and that the "fully accessible" claims of respondents encompass widely different definitions and levels of accessibility.

PREPARING FACULTY FOR ONLINE INSTRUCTION

As noted above, another factor ultimately affecting online student success is faculty preparation to handle the unique aspects of online learning and engagement with online course design principles.

CHLOE 4 queried whether institutions require training for faculty members who are assigned/approved to teach online. Figure 9, below, summarizes the prevalence of faculty training for online course delivery by sector and the scope of that training.

Roughly 60% of institutions in the CHLOE 4 sample require some form of online training for faculty. Less than 5% of institutions requiring faculty training report a waiver process to exempt faculty who meet certain criteria. The most common justifications for such waivers are prior experience at the institution in designing and/or teaching online or training at a previous institution.

Figure 9: Prevalence and Scope of Faculty Training for Online Teaching by Sector

(Required or Conditionally Waived)

Scope of faculty training for online teaching and course development where required or only conditionally waived
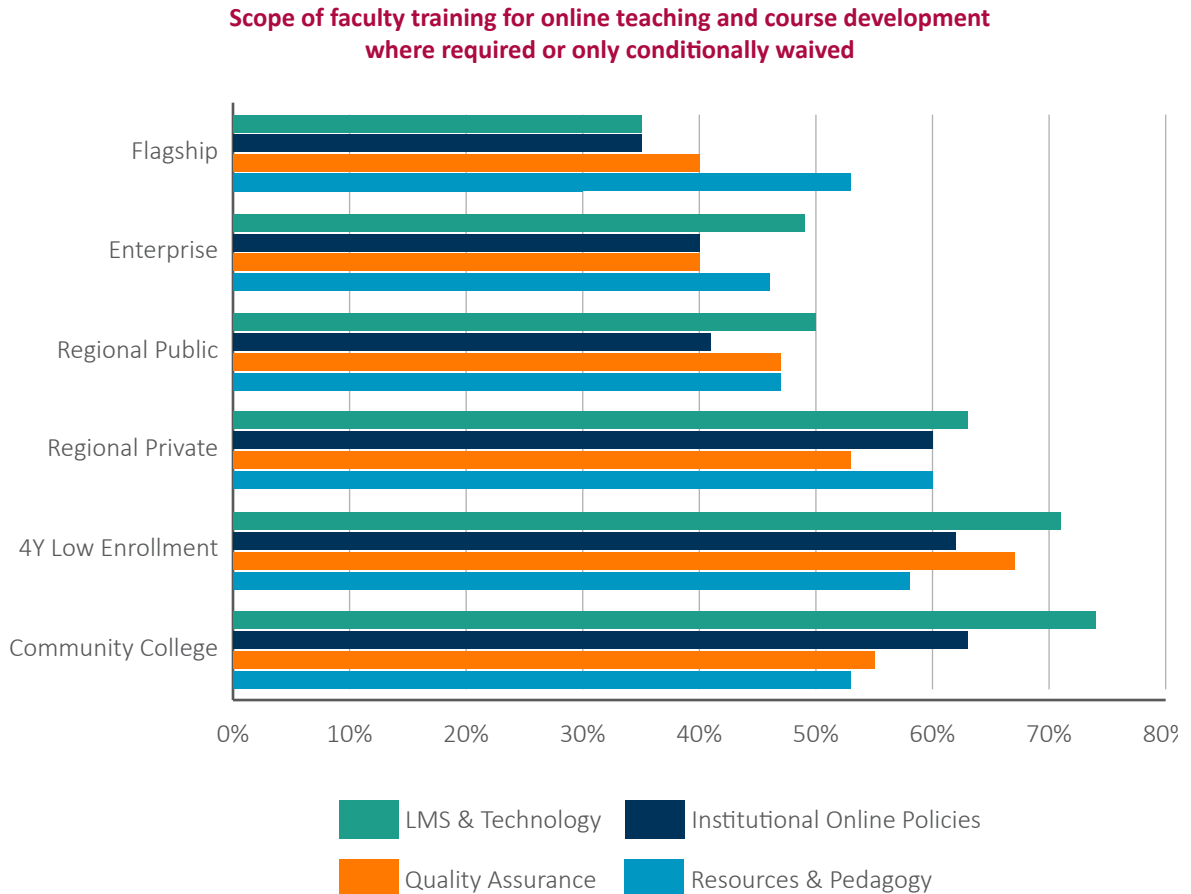
While the overall proportion of schools requiring faculty training is considerably higher than the proportion of schools requiring online student orientation, the relative ranking by sector is largely consistent, with one exception: community colleges fall in the middle range regarding provision of online student orientation but rank higher in requiring faculty training. In most sectors, the most common topic for faculty training is how to navigate the learning management system and other teaching-related technology. There is substantial variation between the sectors, however, as indicated in Figure 9.

Flagship institutions are least likely to require faculty training. This may reflect greater faculty skepticism regarding pedagogical coaching in general and online pedagogy in particular. This, combined with traditions of faculty autonomy at these elite institutions and a reluctance to impose any requirements on them, confidence in the digital capabilities of their highly selective student bodies, or a combination of these factors, makes requiring faculty training a hard sell. Whatever the factors influencing the lack of required faculty training in flagship institutions, these can scarcely be the same factors accounting for a similar lack of faculty training in the majority of large online enrollment enterprise institutions that rely

heavily on adjunct faculty to deliver online instruction. More data is needed to understand the widespread resistance to or rejection of faculty training to become effective online teachers.

TEACHING, LEARNING, AND TECHNOLOGY CENTERS

While the majority of institutions offering online programs require training for faculty members who teach online, an even larger percentage of such institutions provide support to faculty through variously named teaching, learning, and technology centers (TLTs). The CHLOE 4 Survey asked about the presence of such a center, whether there was only one or several serving the institution, or whether such centers existed within individual academic units (see Figure 10). In the sample as a whole, 78% of COOs reported their institution having one or more such centers, with a single TLT serving the entire institution in the majority of cases.

Figure 10: Presence of Teaching, Learning, and Technology Centers by Sector

Does your institution have a Teaching/Learning/Technology Innovation Center, or its equivalent?
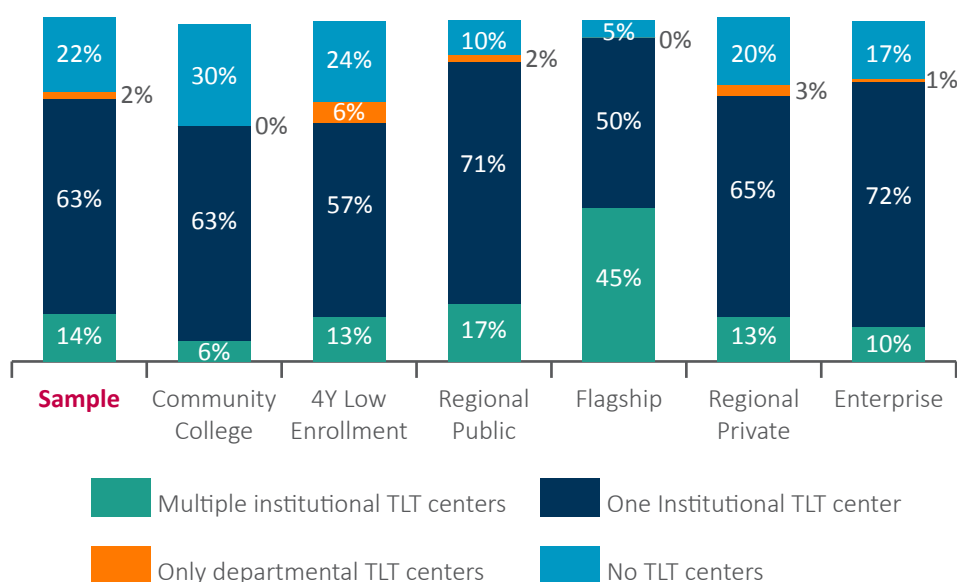
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

TLT centers play a key role in disseminating online learning tools and techniques, working with faculty members individually and in groups. They often serve as a campus forum for discussion of technology and pedagogy, and they typically sponsor faculty and staff collaborative projects. For institutions that do not require formal faculty training for online course design and delivery, a TLT center may be the means to make such help available to willing faculty members. Thus, for example it may be no accident that flagship institutions, which are the least likely to require online training for faculty members have the highest proportion of TLT centers overall and by far the greatest incidence of multiple TLT centers within a single institution.

Differences among the individual sectors with regard to the presence of TLT centers are relatively small. The presence of multiple TLT centers ranges from 6% in community colleges to 45% in flagship schools, as noted above. Single, institution-level TLT centers range from 50% in flagship institutions to 72% in enterprise institutions. Institutions lacking TLT centers range from 5% in flagship schools to 30% in community colleges.

The survey also queried the relationship of the COO with the lead TLT center. Overall, 43% of COOs reported supervising the lead TLT or serving on its board of directors. Another 39% reported collaborating with the center but having no formal role. Only 5% indicated no particular role or relationship with a TLT

center. Of the remaining 13% who chose to comment, most split among the first three categories, but two indicated that they report to their TLT center.

Additional questions related to TLT centers remain for further study. How do faculty relate to these centers? Is required faculty training delivered through centers or are all their services optional and elective? Do they provide assistance to faculty members seeking to integrate online media and content into their courses – web enhanced, blended, and fully online? Do these centers focus on basic faculty training to use online tools or testing and rolling out newly acquired technology, or do they focus on experimenting with cutting edge tools and techniques – or some combination of these needs? How do COOs assess the impact of the TLT centers on the quality and effectiveness of online learning? The CHLOE project will return to this topic in the future.

COUNCILS AND COMMITTEES FOR ONLINE LEARNING

In CHLOE 3, we inquired about institutional approaches to shared governance for online learning. More than 60% of the COOs reported that their institution had one or more standing committees or councils dedicated to online learning. About half of the remaining institutions indicated that an existing institution-wide body with a broader mandate handles online issues. Most (87%) of the committees include faculty members, 76% include the COO, and 72% include other administrators. A small number (19%) include students as members of the committee. In the majority of cases (75%), a senior institutional officer appoints the members of the committee. The majority (60%) of COOs chair or co-chair the committee; of the remainder, one-third indicated that they were only members of the committee. With regard to the scope of the committee, the focus was more advisory than determinative.

In CHLOE 4, we revisited the issue of shared governance and once again found the majority (62%) of institutions have one or more councils or committees focused on online learning. COOs who reported that their institution has a committee or council also shared information about the membership of the committee. Faculty are represented on the majority (90%) of committees — perhaps emphasizing that online learning is an academic activity (Figure 11). COOs are also obvious members of these committees, with representation on 75% of the committees — and the majority of them as chair. The remainder of the committee participation reported includes other campus officers and administrators (73%), others (23%), students as full members (18%), and students as observers (3%). In terms of how members are chosen, the vast majority (73%) are appointed, 17% are elected, and 32% identified as "other," which was explained as members volunteering to be on the committee.

Figure 11: Membership in Online Learning Committees and Councils
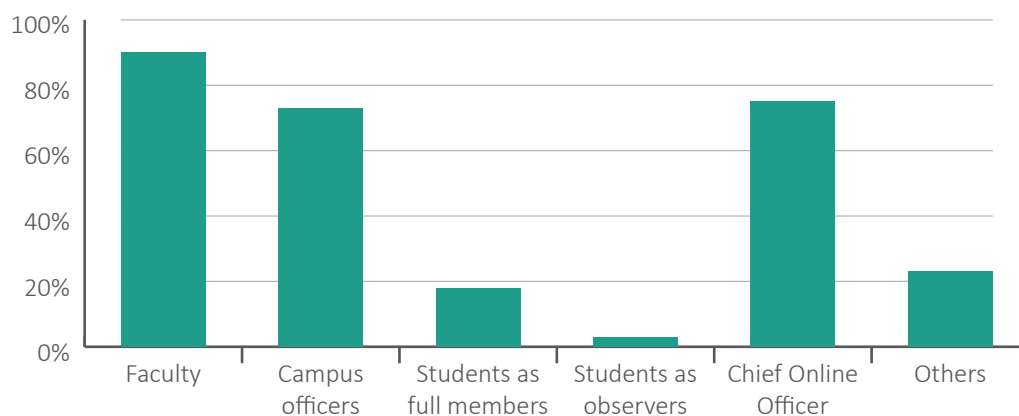
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

In CHLOE 4 we also asked COOs about the functions of the committee. In general, COOs indicate that the committee is primarily advisory in nature. Of the 21 functions considered by the COOs, not a single one was determinative in a majority of the institutions (Table 13). In just three areas, the majority of these committees are not involved at all: faculty recruitment, budgeting, and marketing. It should also be noted that the vast majority of institutions cite a determinative or influential role for these committees or councils on issues related to online policy. These appear to be the areas in which these committees fill a gap that other deliberative bodies may feel unequipped to address.

Table 13: Scope of Online Learning Committees or Councils

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%
Vetting New Technology	6%	73%	20%
Online Technical Support	5%	62%	33%
OER Policy & Support	5%	59%	36%
Regulatory Compliance	5%	54%	40%
Intellectual Property Issues	5%	61%	34%
Faculty Recruitment	5%	24%	71%
On-campus Technology	4%	70%	27%
Accessibility Issues	4%	77%	19%
Budgeting of Online Functions	4%	41%	55%
Contracting with External Providers	4%	56%	41%
Marketing of Online Programs	0%	41%	58%

For anyone with higher education experience, it probably seems natural to create a committee for almost any activity given the shared governance culture of our institutions. The need of COOs to take a collaborative approach to engage multiple constituents only underscores this tendency. The typical advisory role of these groups enables some consistency and influence in important areas while still respecting the traditional authority and academically related decisions of faculty, departments, and schools. Perhaps we will see such committees gain more influence on a wider range of areas over time.

ONLINE COURSE, PROGRAM, AND ENROLLMENT TRENDS

Overall higher education enrollment is flat or down at many schools, but for many student types, online enrollment has long been a rare source of growth. As more schools have entered the online market and launched more programs, ongoing questions remain, such as when supply might outpace demand and when online enrollment mainstreams to the point that it is too large to counter overall growth inhibitors.

CHLOE 4 posed several questions on this theme. This section examines:

- The mix of fully online and blended programs and courses
- Fully online course enrollment trends
- Plans for new fully online and blended programs

The Mix of Fully Online and Blended

Figure 12 shows the mix of fully online and blended degree and other credit-bearing programs offered in spring 2019 across the CHLOE 4 sample. Are fully online programs more popular than blended programs at certain levels or at certain types of institutions?

Figure 12 focuses on the three main types of institutions in the sample: public two-year, public four-year, and private nonprofit four-year, showing the breakdown by program level and fully online versus blended delivery.

Figure 12: Fully Online Dominant, Except at Two-Year Schools

Fully Online & Blended Programs by Level
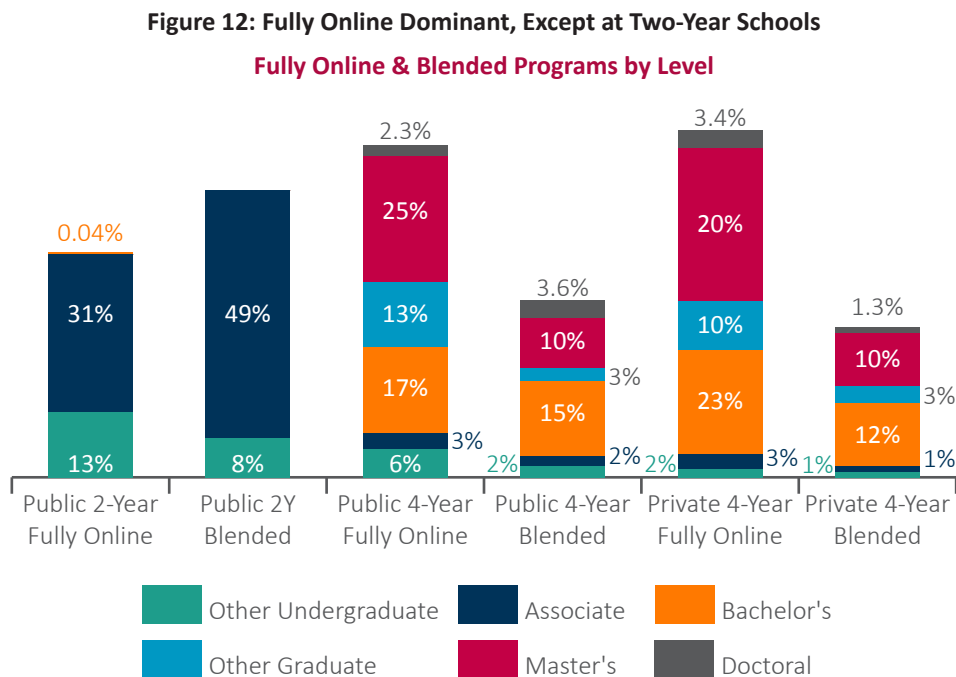
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

How to read Figure 12? For each of the three institution types, online and blended programs by level of study are shown as a proportion of the total number of online and blended programs reported for each institution type. For example, among the online and blended for-credit programs offered in spring 2019 at public two-year schools, 31% were fully online associate programs, 49% blended associate programs, 13% fully online other undergraduate programs, and 8% blended other undergraduate programs. A mere 0.04% of public two-year online and blended for-credit programs reported to CHLOE 4 were online bachelor's programs. The two columns for each institutional type add up to 100%.

For community colleges, blended programs represent the majority of the combined online and blended total online public two-year institutions, and for associate programs specifically. Public two-year schools, however, offer more fully online non-degree programs than blended ones.

The preponderance of blended associate programs among community colleges (61% of online and blended associate programs combined) suggests that fully online delivery remains a challenge for many two-year school students, although fully online associate programs remain plentiful. Indeed, there is a wide range among community colleges in terms of the online –blended associate program split. Some schools offer only online or blended associate programs, some are dominated by one or the other, and others exhibit a balance between the two. The "right" mix appears uncertain, accepting that field of study emphases by institution may be an important factor.

Community colleges reported 69% of online associate programs and 86% of blended associate programs in the core sample. Public and private four-year schools that offer either fully online or blended associate programs are more likely to offer them fully online. This may indicate an attempt to reach a more academically strong student or may be a market mismatch. Overall, only 42% of online and blended associate programs reported to CHLOE 4 are fully online.

The mix among public and private four-year schools is different, taking in graduate programs, and, unlike two-year schools, fully online programs are dominant. Among public four-year schools, online programs outweigh blended programs at every level save doctoral. At the bachelor's level, the online and blended ratios are almost balanced. Among private four-year institutions, fully online programs dominate at every level.

At the bachelor's level, for public and private four-year schools together, if fully online and blended bachelor's programs are considered in aggregate, 57% of these programs are fully online, rising to 73% at master's level, and 80% for non-degree graduate programs. The ratio is 49% fully online for doctoral programs.

At both four-year public and private institutions, online master's programs are the most common type of online program, representing 25% and 30%, respectively, of all for-credit online programs offered. This reflects higher online penetration at the master's level—close to 40% of all master's students in 2019 were studying fully online, according to Eduventures estimates—and more specialized programming.

This data points to greater comfort with fully online programs among four-year schools, particularly at the master's and graduate non-degree levels where enrollees have by definition succeeded as undergraduates. Blended significance for doctoral programs reflects a smaller market opportunity, reduced scope for large enrollment programs, and close relations between the individual student and faculty, although there are plenty of fully online doctoral programs. The relative prevalence of blended programs at the bachelor's level is an extension of reticence about fully online programs at the associate level: a concern that fully online is not a good fit for undergraduates generally.
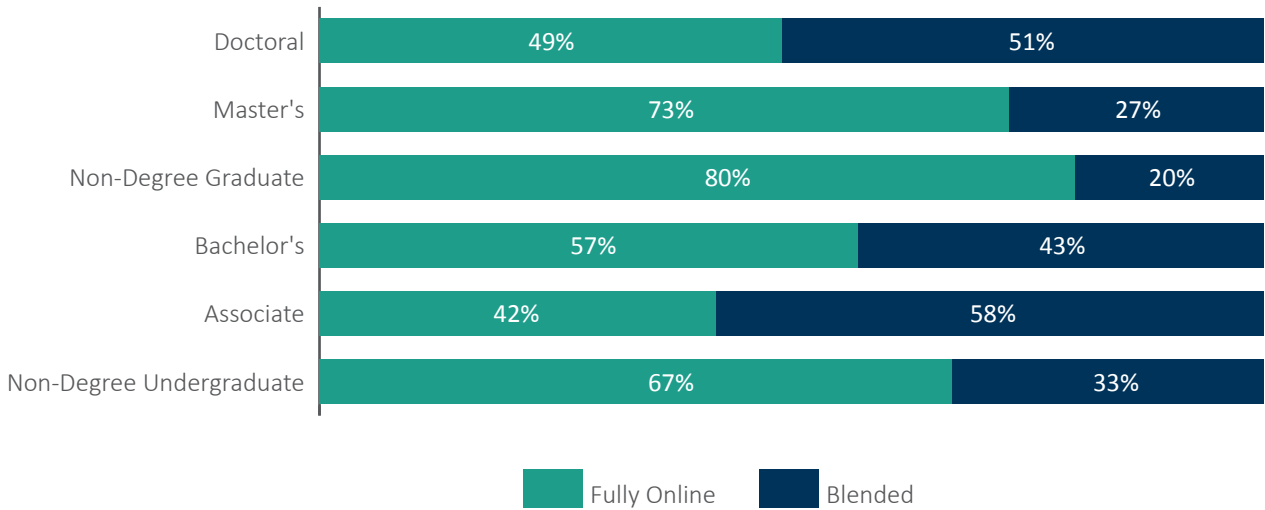
Only among community colleges are non-degree undergraduate programs significant in number and ratio of fully online to blended programs. Gradate non-degree are more visible, constituting the third largest fully online credential type for both public and private four-year schools.

Figure 13 summarizes the online-blended program ratio by level across the sample.

Figure 13: Fully Online vs. Blended Programs by Level

(For Public Two-Year, Public Four-Year & Private Four-Year Schools in the CHLOE Sample)

| Level	Fully Online	Blended
Doctoral	49%	51%
Master's	73%	27%
Non-Degree Graduate	80%	20%
Bachelor's	57%	43%
Associate	42%	58%
Non-Degree Undergraduate	67%	33%

■ Fully Online   ■ Blended

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Behind these averages, among four-year institutions the mix between fully online and blended bachelor's and master's programs varies widely, from 100% of each, to one dominant, to a balance. At both levels, all online and zero blended is much more common than the other way around.

At the course level, undergraduate and graduate combined, all three institution types reported a two-thirds online, one-third blended mix. Figure 14 shows the proportion of fully online courses—for-credit regardless of level—by sector, as a proportion of all courses (campus-based courses included).

Figure 14: Fully Online Courses Are Common at Many Schools

Fully Online Courses as % of Total Courses

■ Public 2-Year   ■ Public 4-Year   ■ Private 4-Year
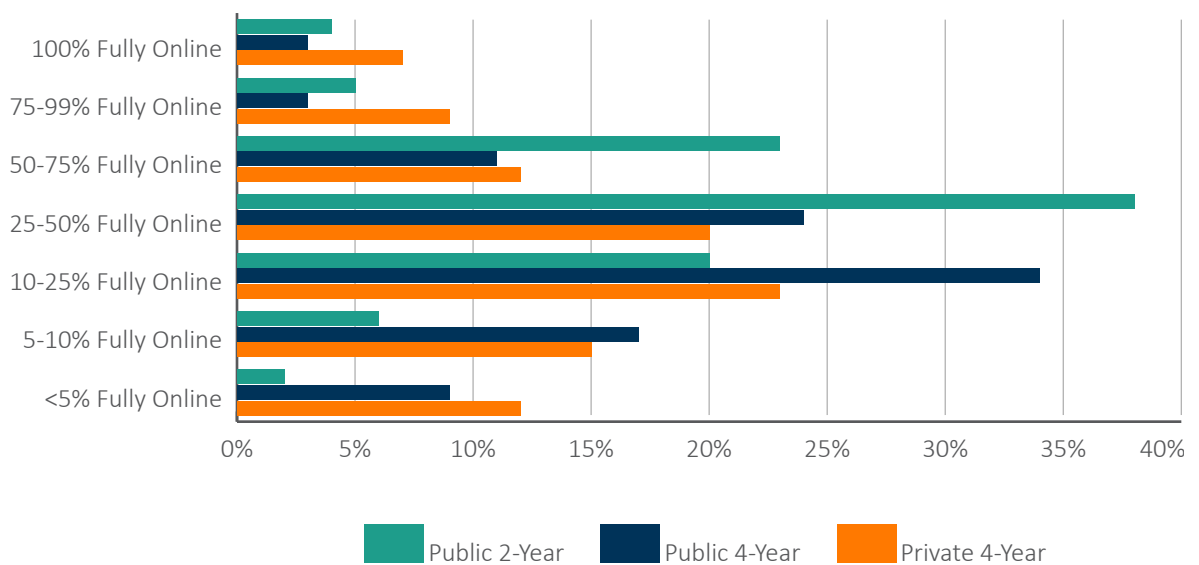
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Figure 14 shows that fully online courses are most prevalent, on average, at community colleges, then public four-year schools, and then private four-year. In all three sectors, the majority of schools report an online course ratio between 10% and 50%. Regardless of sector, however, the online course percentage covers the spectrum from zero to 100% at individual institutions. Generally lower online course ratios were reported by research institutions, public and private.

Figure 15 shows blended courses, again for-credit but regardless of level, as a proportion of the total. The CHLOE 4 Survey defined a blended course as one containing a mix of online and in-person activities.

Figure 15: Blended Courses Are Less Common at Most Schools

Blended Courses as % of Total Courses
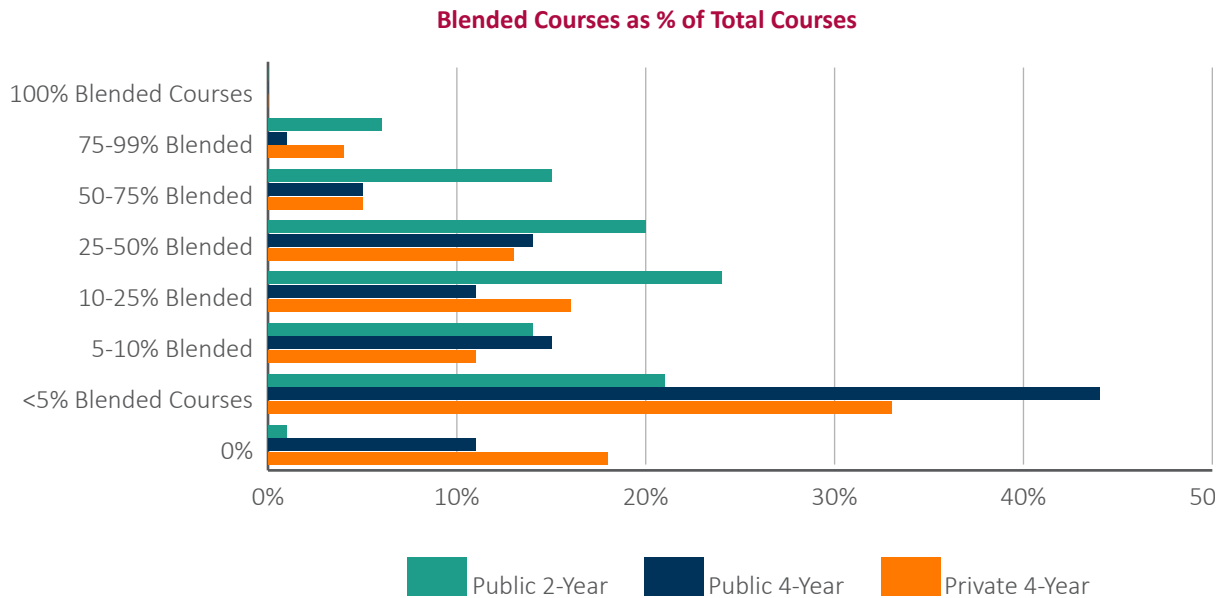
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

The shape of the blended course distribution is quite different. The typical four-year institution reports 10% or fewer blended courses as a proportion of the total, with only community colleges trending higher. The blended spread is still wide, with a few schools claiming that 50% or more of all their courses are blended. Again, research institutions stand out: over 60% say that 5% or fewer of their courses are blended, but more than 10% say the ratio is a quarter or higher.

Overall, it is clear that schools of all kinds continue to tend to favor fully online over blended courses. At a growing number of institutions, fully online and blended courses combined constitute the majority of total courses.

Fully Online Course Enrollment Trends

The next topic is online enrollment growth trends. Figure 16 shows growth patterns for fully online courses at the undergraduate and graduate level for spring 2019 compared to spring 2018. CHLOE 4 was the first CHLOE survey to break out undergraduate and graduate fully online enrollment.

Figure 16: Online Still Growing... and Stable

Fully Online Courses- Enrollment Growth Spring 2019 Y/Y
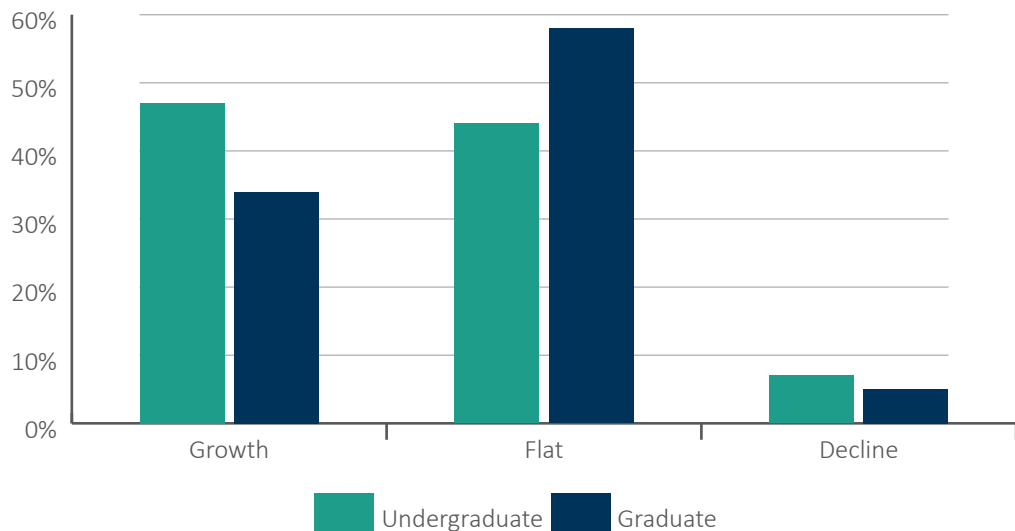
Figure 16 presents a mixed picture. Almost half of COOs responding to CHLOE 4 reported positive enrollment growth in fully online undergraduate courses in 2019. A third of those offering graduate courses did the same, but many respondents cited stability instead. Indeed, this was the most common response for fully online graduate courses. Few COOs, at either the undergraduate or graduate level, reported that fully online course enrollment fell.

It is important to remember that Figure 16 concerns fully online courses generally, not only fully online programs. At the program level, according to IPEDS data up to fall 2018, fully online graduate enrollment has outpaced undergraduate growth (7% compared to the prior year, versus 3%). Fully online course enrollment includes the numerous traditional-age undergraduates enrolled in one or two online courses as part of an otherwise traditional experience. The growth of this population has long exceeded that of fully online undergraduates, who tend to be adult learners: a market segment that has experienced declining enrollment in recent years in the wake of a sustained strong economy. The "some online" population is much less important at the graduate level, where fully online programs are more significant. These points are consistent with the trends outlined in Figure 16.

Online course enrollment growth showed little variation by sector. By online enrollment scale, similar patterns were also evident, but at both the undergraduate and graduate levels. "Large" schools—those with 7,500+ fully online course enrollment—were most likely to report year-over-year growth: 55% versus 47% in the undergraduate sample and 41% versus 34% at graduate level. "Large" schools, however, were also most likely to report declining fully online undergraduate course enrollment. These findings highlight the strong position of many schools with deep experience in online education but are also evidence of a dynamic market where past success does not guarantee future gains, and other institutions aspire to growth.

Research institutions, public and private, were more likely to assert undergraduate (61% vs. 47% average) and graduate (45% vs. 34%) online course enrollment growth. This is a reminder of the greater presence of such schools in the online market.

Average fully online course enrollment growth for spring 2019 was 19% year-over-year at the undergraduate level, among schools that reported positive growth. Schools with fewer than 1,000 fully online students reported the fastest growth (28% on average), and "Large" schools the slowest (13%). The average decline at the undergraduate level was 7%, but the pattern was reversed: "Large" schools declined only 3% on average versus 9% at "Small" schools.

At the graduate level, average positive growth was 13%, with little variation by enrollment scale. Average decline was 5%, again with little variation by size.

Fully online course enrollment growth was broadly in line with CHLOE 3 results: spring 2018 vs. 2017. The proportion of "large" schools reporting growth dropped in 2019, but the number of such schools in the CHLOE 4 sample was about three times the total for CHLOE 3, making direct comparisons problematic.

In summary, CHLOE 4 suggests that fully online course enrollment growth remains positive at many schools, in a context of lackluster enrollment growth overall. Online education is now common enough and significant enough at many schools that it can no longer outrun overall enrollment softness—hence the large proportion of COOs who report that online enrollment is stable rather than growing.

Prior Academic Credit Awarded in Fully Online Programs

CHLOE 4 sought information on the relative importance of students with prior credit for fully online programs. Figure 17 compares the ratio distribution for undergraduate and graduate fully online programs divided between students with prior credit from the reporting institutions and students with credit from other institutions.

Figure 17: Students Awarded Prior Credit Are Common in Many Online Programs

% of New (prior 12 months) Fully Online Undergraduate and Graduate Program Students with Prior Academic Credit
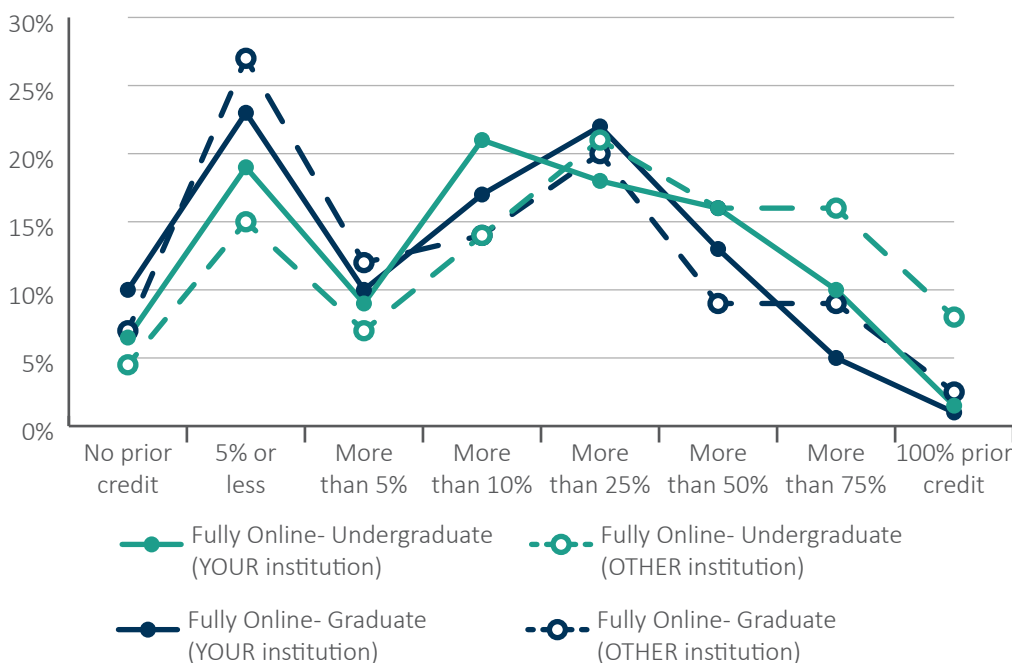
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Practice is diverse: at some schools incoming credit is absent or insignificant, while at others it is the norm for online students. At most schools, students with prior credit represent at least a sizeable minority of new online students, emphasizing the appeal of online programs as a practical means of degree completion.

At both undergraduate and graduate levels, prior credit from other institutions is more significant, but the internal pipeline is also strong at many schools. CHLOE 4 did not inquire as to whether this internal pipeline is by design—explicit stopping-off points or stackable credentials—or a purported solution to attrition in campus-based programs.

Not surprisingly, prior credit is less prevalent at the graduate level, where dominant master's programming is relatively short and drop-out rates are lower than at the undergraduate level. There are still a significant number of schools that place notable reliance on what might be called the "some graduate credits, no degree" population. The rise of stackable credentials, not least at the master's level, is consistent with this, particularly concerning incoming credit from the same institution.

Plans for New Fully Online and Blended Programs

Online enrollment trends remain positive at many schools, although many others report stability. In this climate, do COOs plan to launch new fully online or blended programs? Are schools with the largest number of online students most likely to launch new programs, and to launch the largest number, or do the schools with a smaller base have those distinctions?

Figure 18 presents COO plans for new undergraduate online programs by current online enrollment scale.

Figure 18: More Online Programs Planned

Chief Online Officer Plans for New Fully Online Undergraduate Programs- next 3 years
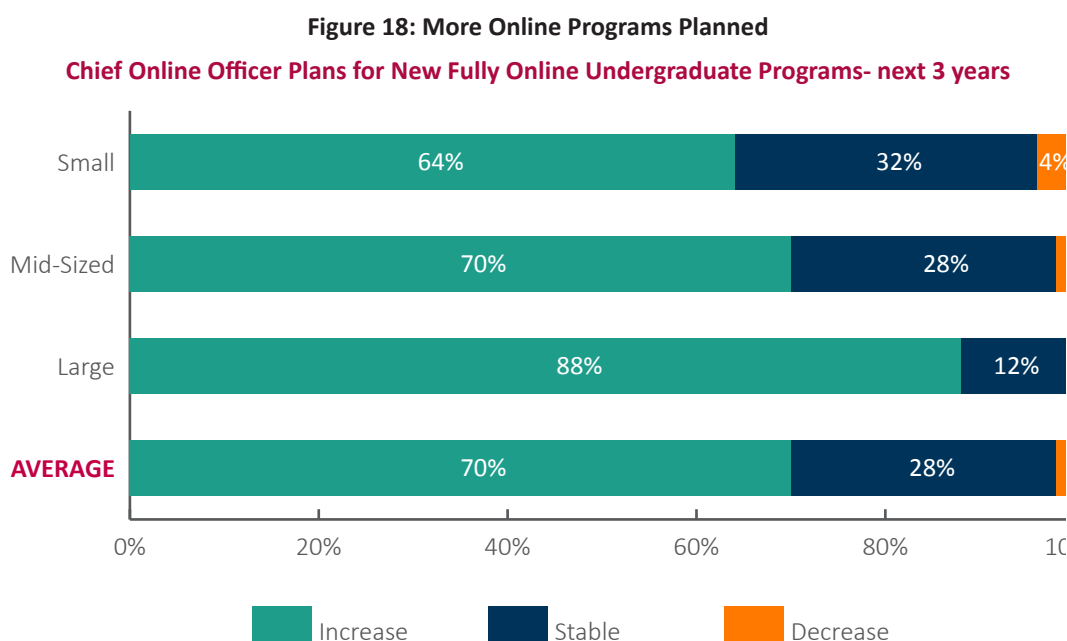
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Most COOs expect to launch additional fully online undergraduate programs in the next three years, but schools with the largest number of existing online students are most likely to do so. Very few COOs anticipate dropping any such programs, but that falls to zero for the big players. A stable portfolio accounts for about a third of the sample, but only 12% for "large" online enrollment institutions. Large schools also lead when it comes to the number of new programs planned—an average of six over the next three years, compared to five for mid-sized and four for small online enrollment schools.

The picture at the graduate level is yet more emphatic. Not a single COO indicated plans to cut fully online graduate programs, and 85% plan to add some. Again, "large" online enrollment schools are most likely to do so, but only marginally at 89%. These "large" schools plan to launch an average of six new fully online graduate programs over the next three years, matched by mid-sized players but ahead of the average of three expected by their "small" counterparts.

Plans for blended programs are quite different. The most common response from COOs is that the blended undergraduate program portfolio will remain stable for the next three years (55% of the sample). About 43% expect gains, and very few (2%) anticipate shrinkage. The situation is very similar for blended

graduate programs, where a small majority of COOs that offer such programs expect stability and most of the remainder plan to grow. For both undergraduate and graduate blended programs, the average number of new offerings is in line with fully online program plans.

In summary, CHLOE 4 results suggest that online market incumbents plan to solidify their lead by launching more programs than their smaller rivals. There is no sign—generally speaking—that COOs think the online higher education program market is saturated or has peaked, even though at many schools fully online course enrollment has stalled. It is an open question whether more online programs will reignite enrollment growth or further fragment the market. No doubt the answer will vary by institutional type, level, and field of study.

When it comes to blended programs, plans are more evenly split between stability and program growth. This reinforces other evidence from CHLOE 4—and earlier surveys—that at most schools blended programs remain in the shadow of online programs. Neither market competition nor consumer demand has yet persuaded many COOs to downplay fully online programs in favor of blended ones.

ONLINE PRICING AND REVENUE

For any higher education institution, and any course or program, financial sustainability is a key consideration. For online courses and programs, the money question is often especially pertinent. Many schools view online learning as a way to reach new markets and to bring in valuable revenue; and there is longstanding debate about whether the online delivery mode itself has financial implications. Some advocates assert that online programs permit certain efficiencies that lower cost, while others point to online as either cost neutral or costing even more to design and deliver than the on-campus norm.

Under this heading, the CHLOE 4 Survey posed questions on:

- Understanding of Cost: Relative confidence among chief online officers in understanding the cost details of online education and how it compares to the understanding of campus-based programming costs

- Tuition: Online vs. on-campus program tuition (including rationales for any differences)

- Fees: Student fees specific to online learning

- Compensation: Faculty compensation models for developing online courses

- Budgetary Stance: Online education as a source of net revenue vs. net cost

- Revenue Distribution: Online education revenue distribution arrangements

Understanding Cost

CHLOE does not attempt to get at actual online education costs. A survey may not be the best means to gather this information, and asking for specific figures might touch details many institutions do not want to share or make survey completion unreasonably onerous. Even coming to a common definition of what to include when calculating online or campus-based education costs is challenging.

Instead, CHLOE 4 asked chief online officers, for the first time, to indicate their relative confidence in understanding the cost details of online education (see Figure 19). Gauging leaders' understanding of costs provides context for CHLOE findings on price and budgets.

Figure 19: COOs' Level of Understanding of Online Costs – Widespread Uncertainty

Describe your level of confidence in understanding the cost details of developing, delivering, and maintaining your institution's online programs.
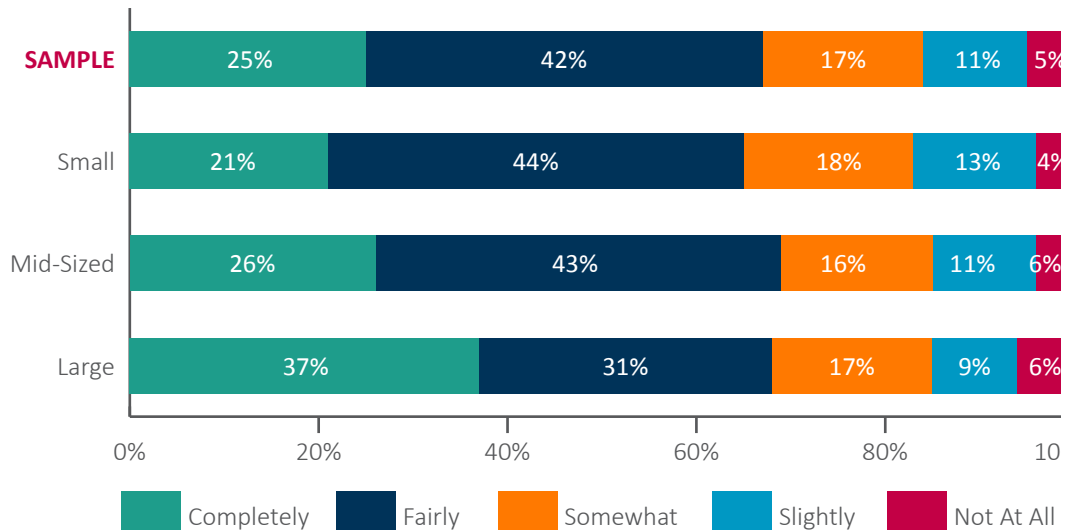
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Figure 19 suggests widespread uncertainty among chief online officers when it comes to a complete understanding of online learning costs at their institution. Only a quarter of the sample express complete confidence in their understanding. About two-thirds of COOs are at least fairly confident and the remainder less so.

Not surprisingly, COOs at schools with the largest numbers of online students present the highest level of confidence (37% are completely confident), but a third of even this group are uncertain. This may reflect the divide among the "Large" group between fully and majority online schools for whom a detailed understanding of cost is core to the business and large campus-based institutions where online has emerged more organically with limited central oversight.

Regardless of online enrollment scale, about a third of COOs are no more than "somewhat" confident about their online learning cost structures, but there are differences by sector. The small CHLOE 4 for-profit sample—nine schools—expressed either complete or fair confidence without exception. Only 18% of COOs at public two-year colleges cited complete confidence, compared to 25% at four-year publics and 29% at four-year private nonprofits.

CHLOE 4 then asked COOs how their understanding of online education costs compared to their understanding of campus program costs (Figure 20).

Figure 20: COOs' Level of Understanding of Online vs. On-Ground Costs

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?
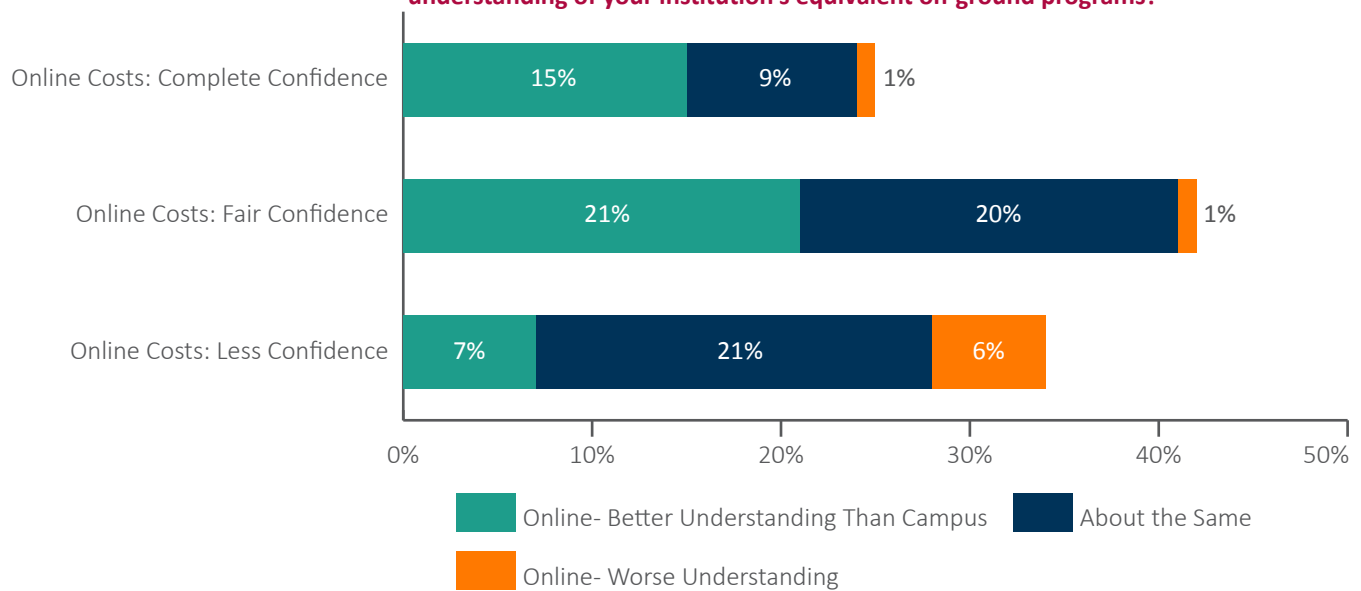
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Figure 20 shows the distribution of the whole sample. Let us start with the top row: as shown in Figure 1, 25% of COOs in the CHLOE 4 sample said they had complete confidence in their understanding of online program costs at their institution. As a proportion of all CHLOE 4 COOs, within this "complete" confidence group, 15% of COOs are more confident about their understanding of online costs than their understanding of the costs of equivalent on-campus programs, while 9% are equally highly confident in their understanding of both program-type costs, and only 1% view their strong grasp of online costs as short of their grasp of equivalent on-campus program costs.

Among COOs that express fair confidence in their understanding of online program costs (42% of the sample), as a proportion of all COOs, 21% think their online understanding outperforms their grasp of campus costs, 20% judge their grasp "fair" on both counts, and only 1% view their online understanding as superior.

Finally, taking the remaining 33% of the CHLOE 4 sample that expressed no more than modest confidence in their understanding of online program costs: 7% see their online understanding, despite its limitations, as still a cut above their knowledge of on-campus costs; 21% admit limited understanding of both delivery modes; and only 6% are more confident in their understanding of on-campus costs.

In summary, a large minority of COOs think they have a better understanding of online program costs than on-campus ones, but only 25% of COOs have complete confidence in their understanding of the former, and only 24% say the same about both delivery modes. About half of COOs regard their knowledge of online and campus costs as comparable, including 21% who attest to a limited understanding of both.

It is perhaps surprising that few COOs—a mere 8% of the sample—point to their superior understanding of on-campus program costs. Greater experience with online programming, and little background with on-campus programs, is one explanation—a sign of the longevity and pervasiveness of online learning in U.S. higher education. Widespread ignorance about program cost details generally, regardless of delivery mode, is another. Many COOs, organizationally and culturally, may be tasked with developing online programs, marketing them, and serving students, but do not and are not expected to delve into cost dynamics beyond high-level budgeting.

Online Tuition and Fees

COO knowledge of program costs sets the stage for CHLOE 4 data on how online programs are priced—in terms of tuition and online-specific fees. COOs were asked how tuition compares between equivalent online and on-campus programs at their institutions (see Figure 21).

Figure 21: Online Tuition Compared to On-Ground Tuition

(Select One Response)
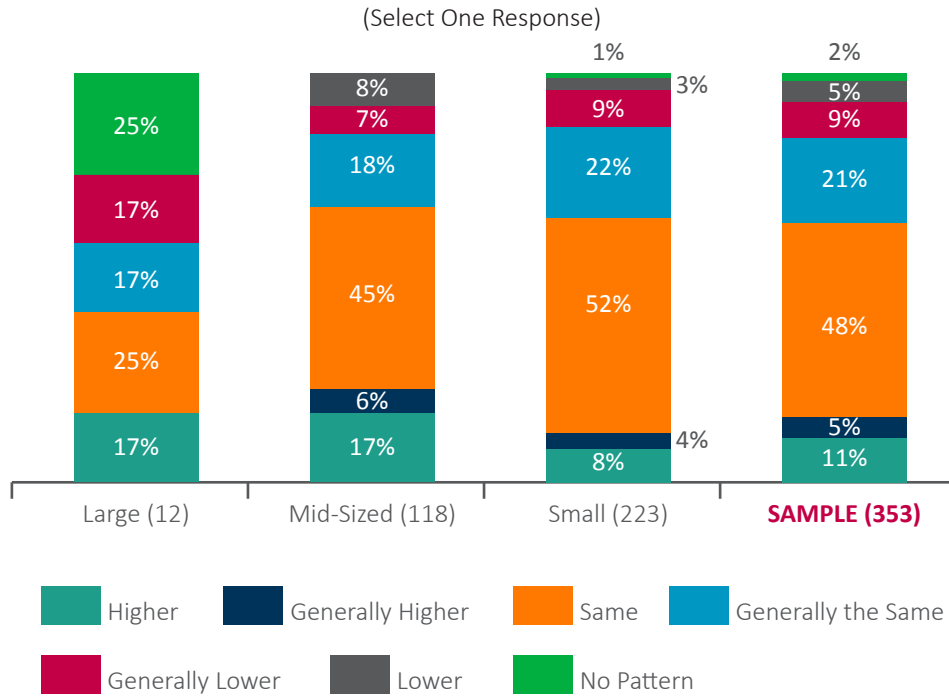
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Pricing online programs in line with campus equivalents remains the norm: 48% of the CHLOE 4 sample indicated that is their policy, and another 21% said online programs are generally priced in line with on-campus programs. A significant number of schools, however, price differently. Premium online pricing is uniformly charged by 11% of schools, and another 5% typically charge more online. Five percent of COOs say their schools always price online programs lower than the on-campus equivalent, and another 9% say this is generally the case.

CHLOE 2 reported similar pricing patterns, but in CHLOE 4 there is some evidence of a reduction in resorting to premium and lower pricing. Real and perceived costs, general funding pressures, and competition may be limiting pricing options. Only 2% of the sample said pricing was devolved to departments, but this accounted for a quarter of schools with the largest number of online students. Again, this reflects the mixed nature of this group, including some large institutions where online learning has scaled without a great deal of central direction.

Public schools are more likely to charge a premium for online programs, and private schools less likely, which is consistent with pricing norms. Some private four-year schools may see online education as a way to offset high priced on-campus programs. Community colleges, faced with the lowest revenue per student and lowest general pricing, are most likely to charge a premium for online (15% of community college COOs said premium pricing was applied for all online programs, and another 6% said a higher price was generally in place).

CHLOE 4 then posed the question of rationale: why do some schools price online programs higher or lower? Figure 22 lays out the logic behind higher prices for online programs.

Figure 22: Premium Online Pricing Driven by Higher Costs

You answered "higher than conventional tuition." What justifies the policy?
(Select all that apply.)
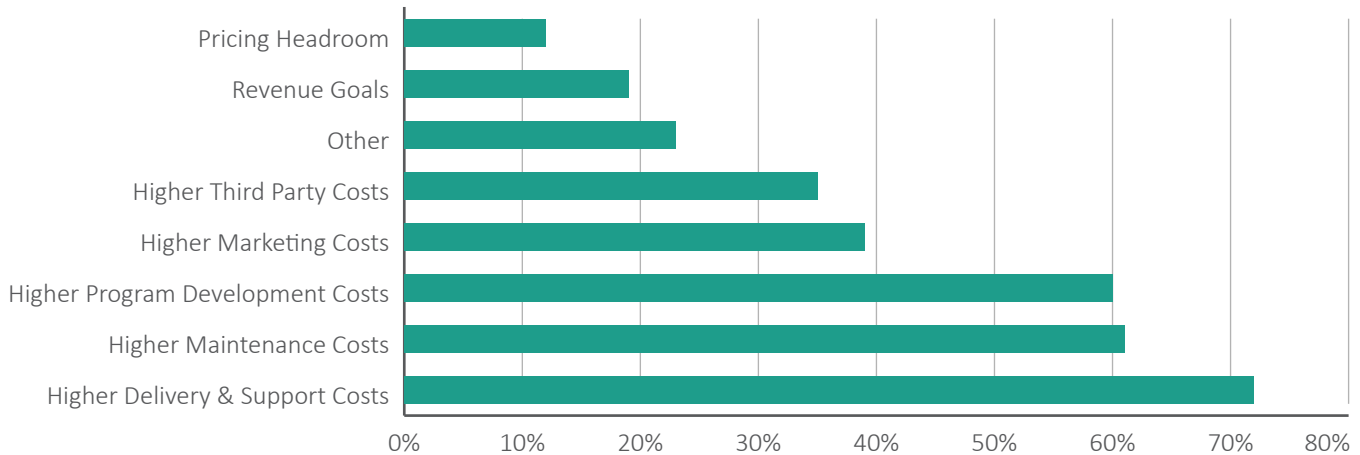
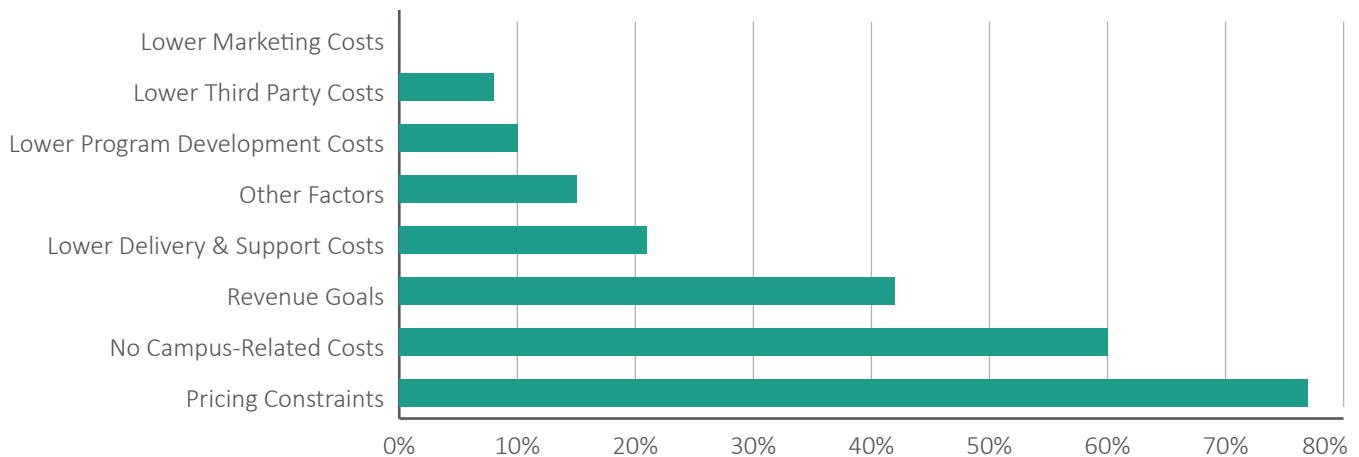*Source: Eduventures Research and Quality Matters, CHLOE 4, 2020*

Among the 57 CHLOE 4 respondents who said they uniformly charge a premium for online programs, development and delivery costs stand out as the leading rationales. On this view, quality online programming simply costs more than the on-campus norm, and some of that cost must be passed on to students. Higher marketing cost is cited by 39% of online premium price schools as a key driver, perhaps signaling an increasingly crowded and commoditized market. Third-party costs—outsourcing various functions, including to OPMs or online program management firms, is related.

The justification of pricing headroom was rarely cited as a rationale for higher prices for online programs—again suggestive of a crowded market—but may help explain higher than standard tuition at some community colleges. These findings are broadly consistent with those of CHLOE 2, but it is notable that more schools cited the high cost of delivery and support, and fewer cited pricing headroom.

Figure 23 looks at the logic of lower pricing for online programs.

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.)

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Market realities top the list of reasons why some schools charge less for online programs. Now that online programs are commonplace in many fields and are offered by a wide range of institutions, and many programs resemble each other, price can be a tangible differentiator. "Revenue goals," in third place, is related to this.

On the other hand, "no campus costs" is second most referenced. This implies that some COOs view online education as explicitly excluding certain campus expenses and not adding significant new ones, and, therefore, in that sense, it is at least inherently cheaper to develop and deliver. Far fewer COOs, however, cited lower program development or delivery and support costs. Some institutions have figured out ways to directly develop and deliver online programs at a lower cost than on-campus equivalents, beyond simply the absence of certain services restricted to in-person students, but this is the exception.

Based on evidence from CHLOE 4, the promise that online education can deliver lower costs and lower prices has rarely been realized in U.S. higher education. No school pointed to lower marketing costs for online programs as a pricing stimulus, indicative of a competitive online market and well-worn recruitment techniques employed by numerous schools. CHLOE 2 found similar rationales for lower online prices, but reference to pricing constraints in a competitive market jumped in CHLOE 4—to 77% of respondents with reduced-price online programs, compared to only 60% in the prior survey. This is further evidence of a more crowded online market.

It is interesting to note that COOs who price online programs lower than on-campus are all at least "somewhat" confident in their understanding of online costs, whereas there is no such pattern among those who charge a premium for online. As noted above, it is community colleges that are most likely (21%) to charge such a premium, driven by the search for more revenue rather than necessarily a strict cost calculation. Without good cost data, it is risky to price too low or too high. The starting point for community colleges, however, makes premium pricing less risky, even without solid data.

Among private four-year schools, more likely to charge less for online education (such schools make up 30 of the 48 schools that cite this pricing strategy), the rationale may be driven by well-understood list price pressures for on-campus programs, avoidance of significant campus costs online, and larger margins to play with. Strictly lower online learning costs, or well-understood cost models generally, are rarely as important.

Online Fees. Now that we have reviewed COOs' understanding of costs and online program tuition, the next question is online learning fees. Even if tuition is uniform by delivery mode, do institutions levy fees specific to online? Is there any association between the presence or absence of fees and COOs' relative confidence in understanding underlying costs? Figure 24 summarizes fee arrangements.

Figure 24: Differential Fee Structure for Online Students?
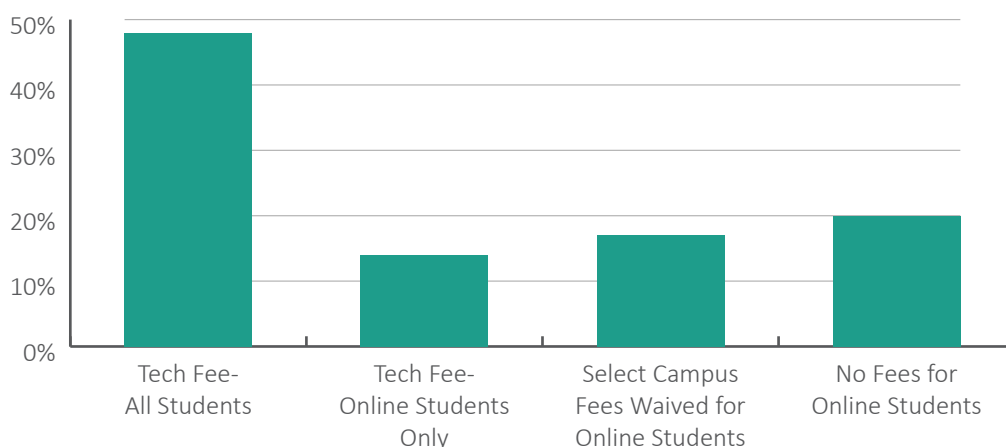
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Schools are divided on "technology fees" (used as a catch-all for fees tied to some sort of remote-access technology) generally: about half the CHLOE 4 sample said they do charge such fees to all students, and the rest do not. Some schools may prefer to limit fees generally, to keep price calculations simple, while others may opt to keep tuition down while using fees to supplement revenue. The end result may be the same in terms of what students pay.

The CHLOE 2 Report stated that only 29% of responding schools charged a technology fee to all students, compared to 48% in CHLOE 4. Sample differences may be important, but growing technology costs may suggest a need for schools to use additional fees to recoup their investment. Over time, as online technology becomes ubiquitous, charging a technology fee may be seen as being as strange as levying a special student fee for electricity or water, but for now the practice appears to be on the rise.

Technology fees charged only to online students are unusual—only 14% of COOs cited the practice. The role online technology plays in the experience of almost all students may prompt a policy of fees-for-all rather than singling out online students. The CHLOE 2 report cited a similar ratio.

Responses to these questions vary little by sector or online enrollment scale. Schools that charge higher tuition for online programs are significantly less likely (33% vs. 48%) to also charge technology fees generally but more likely (35% vs. 14%) to charge such fees only to online students. This reinforces the stance of those schools: online education commands a premium.

On campuses, some fees pertain to in-person activities, such as athletics. To what extent do schools waive such fees for online students? Few do so: only 17% according to Figure 24. Most fees, such as registration, program, financial aid, or graduation, are relevant for all students, whether on campus or online. If a school levies an obviously on-campus, student-only fee, a waiver for online students is hard to disagree with. For schools that maintain that the online and campus student experiences are essentially comparable in terms of services and quality, insofar as the school charges fees, most should not discriminate by delivery mode.

Public four-year schools, many of which run big athletics operations, are likely to cite a waiver of select campus fees. State oversight, calling for statewide fees policies in some cases, may also explain this overrepresentation.

Funding pressures may have convinced the majority of schools that fees are too important a lever to give up. Widespread persistence of the notion that quality online learning inherently costs as much or more than an equivalent on-campus program is another reason why many schools maintain fees. A minority of schools (20%), however, do not charge any fees to online students. The logic here may again be to simplify pricing and to seek an edge over "high" or "hidden" fee competitors.

COOs who expressed the least confidence in their understanding of online learning costs are most likely to charge tech fees to all students, more likely than average to charge a technology fee to online students only, least likely to waive any campus fees, and most likely not to charge any online student-specific fees. The differences are often modest but do suggest that limited cost understanding has driven fee policy at these schools in a wide range of directions.

COOs who claim complete confidence in their understanding of online costs are most likely (19% vs. 14%) to charge a tech fee to online students only, but this far from characterizes the typical policy of such COOs.

Additional fees cited by CHLOE 4 respondents include proctoring fees, particularly in-person, campus fees charged to in-state but not out-of-state online students (or special fees are charged to out-of-state students only), clinical placement fees, and cases where some departments or programs charge fees but others do not.

## Online Course Development Practices and Compensation

One driver of online learning costs has been the logic of paying faculty extra money to develop a new online course or series. When online education was new, this made sense. Faculty needed additional

time and incentive to explore this novel modality. Two-plus decades into the rise of online learning, do institutions continue to pay extra for course development, or is this activity now seen as normal duty that falls under general compensation?

Figure 25: Online Course Development Stipends Common but Far from Universal

What is the primary or dominant compensation model for online course development at your institution?
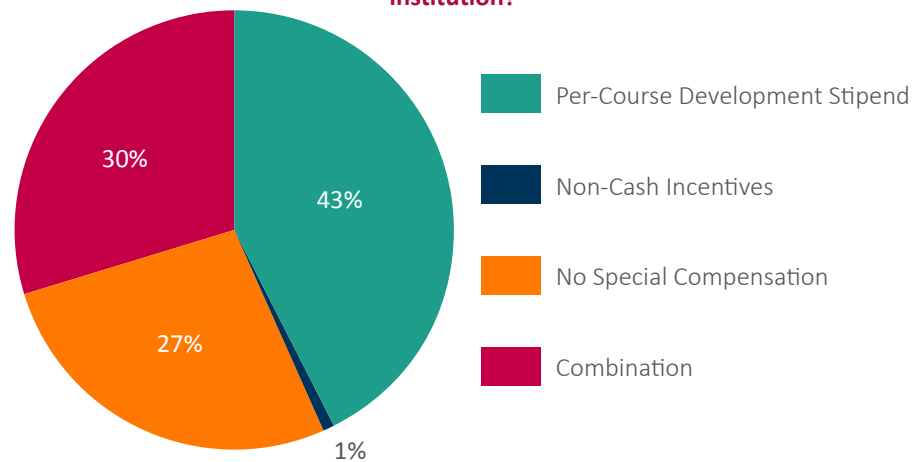
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

The most common institutional policy (43% of the CHLOE 4 sample) is to continue to pay a per-course development fee. This is most common (60%) among private four-year schools, where online education is often less developed. Such an arrangement is least common (30%) at two-year publics, where the opposite is the case. By contrast, a little over a quarter of COOs take the view that online learning is mainstream or uncontroversial to the point that special funding is not needed. Thirty percent of the sample employs a combination of approaches, perhaps using incentives to ramp up development of high priority programs but not others. Non-cash incentives are almost absent, at least as the dominant policy. This policy distribution is consistent with CHLOE 2 findings, suggesting broad policy stability in recent years.

Perhaps surprisingly, schools that enroll the largest number of online students are least likely (9%) to say that online course development is regarded as part of normal duties and merits no special payments. Schools with fewer than 1,000 online students are most likely (31%) to have a normal duties policy. The large schools may view online as strategically critical and therefore worthy of special incentives to drive timeliness and quality. Smaller schools may lack the means to fund additional incentives. Regardless, the most common response, for "Large," "Mid-Sized," or "Small" online enrollment schools, is special per-course compensation. Research institutions, public and private, rarely cite a normal duties policy, and most often report diverse arrangements by program and department.

Interestingly, COOs who express least confidence in their understanding of online learning are far more likely (68% vs. 27%) to say that no special payments are made for online course development. This may reflect assumptions about online and campus cost parity or lack of evidence to make the case for special payments.

Budgetary Assumptions and Revenue Distribution

The CHLOE 4 Survey probed whether chief online officers see online learning as a net revenue generator or a net cost and how online revenue is distributed within the institution.

Since inception, online learning has often been viewed as a valuable source of new revenue, and schools have debated how to most effectively incentivize faculty and departments to get involved and how to use the resulting revenue stream to fund core operations. Figure 26 shows institutional distribution arrangements for online learning revenue today.

Figure 26: Online Learning Revenue: General vs. Allocated Distribution

In general, how are revenues from online programs at your institution distributed? Select one.

A small majority of COOs (55%) report that online learning revenue is simply combined with other tuition and fee revenue for general distribution. At these schools, online learning revenue is just like any other tuition and fee revenue; it supports the institution as a whole rather than nurturing a particular part of it. Under these circumstances, online education is mature and mainstream, not in need of special funding arrangements. Of course, at the course level, many students combine on-campus and online courses, complicating any attempt to allocate revenue by delivery mode.

Other CHLOE 4 respondents point to more specific revenue allocation: a portion of online learning revenue is earmarked for central online support or academic departments. Rarely (about 14% of schools) does either group split all online revenue between them or give one or the other everything. This macro split between general and allocated distribution is broadly consistent with results from earlier CHLOE surveys.

Community colleges are mostly likely (79% vs. 55%) to report that all online learning revenue is pooled for general distribution, and four-year publics are least likely (31%) to do so. Online is arguably most mainstream at community colleges, downplaying the need for earmarking, while the scale and complexity of many four-year publics may necessitate more complex distribution arrangements. Indeed, four-year publics are most likely (26% vs. 13%) to cite that revenue is split between central online support, academic departments and the general fund. Research institutions, public and private, were also less likely than average to say that all online learning revenue is pooled for general distribution.

There is an inverse association between online enrollment scale and general revenue distribution. Only 31% of schools in the "large" online enrollment category say that all online learning revenue is pooled centrally for general distribution, compared to 62% of institutions with fewer than 1,000 online students. This is partly a function of overall institutional size in the "large" group, suggesting greater operational complexity, but may also be indicative of efforts to grow online and, therefore, incentivize different groups and units.

There is an intriguing correlation between online revenue distribution arrangements and COOs' relative confidence in understanding online costs. COOs who assert complete cost confidence are least likely (42%) to report that online revenue is pooled for general distribution, while their least confident counterparts

are most likely (74%) to do so. Lack of control of online revenue keeps COOs in the dark about cost realities; whereas, greater control deepens understanding.

"Other" revenue distribution arrangements are either versions of a pooled general fund, reinforcing the importance of that option, or partial exceptions, such as tuition revenue being pooled but certain fee revenue staying with the academic department or central online support function. A few COOs said arrangements were not consistent across the institution or varied between contractual (fall—and spring—pooled distribution) and non-contractual (winter—and summer—local revenue distribution) periods.

Finally, given relative understanding of cost, tuition and fee arrangements and course development compensation and revenue distribution arrangements, do institutions ultimately see online education as a cost or "profit" center? Figure 27 provides the views of chief online officers.

Figure 27: Online Means Net Revenue but Not Always

Which of the following best describes, from a budgetary perspective, how your institution treats (regards) online programs?
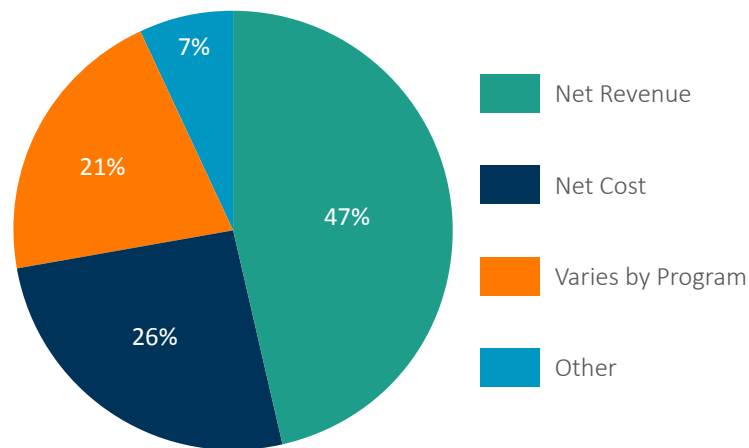
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

The revenue-generating vision for online learning comes through strongly in Figure 27: from a budgetary perspective, the most common COO stance is that in the final analysis online education generates net revenue. This is close to but not quite the majority view. About a quarter of schools regard online as a net cost: vital for operations but not a producer of surplus funds. Another interpretation of this stance is that it says more about how online education costs and revenue are allocated – perhaps costs are tagged to particular functional areas and revenues are rolled up to academic departments – than surplus-generating potential as such. Less than a fifth of schools cite no consistent interpretation. Some programs and departments treat online as a net revenue generator and others as a net cost.

COOs that checked "other" tended to push back on the terms of the question, either viewing the institution's entire operation as sustainable rather than seeking net revenue as such or noting the increasingly blurred lines between on-campus and online students, complicating any calculation of net revenue or cost.

There is very little variation on this question by scale of online enrollment and only modest variation by sector. Private four-year nonprofits are most likely (after for-profits) to treat online learning as a source of net revenue (54% vs. 47%). Public four-year institutions present the most complex profile, consistent with frequently "Large" schools, a mix of online course and online program students, and consequent budget complexities. Research institutions generally were most likely to report wide variation by program.

Once again, the relative cost confidence of COOs stands out as a variable. Chief online officers who rate highly their own cost understanding are most likely (56%) to see online as a generator of revenue, and

their least confident peers are least likely (16%) to do so. Less confident COOs more often cite intra-institutional variation in how online learning is managed, undermining any central view on cost.

Online tuition stance also stratifies responses to this overall budget question. COOs at schools that price online programs below the on-campus norm are much readier than average (75% vs. 47%) to state that online is a source of net revenue. This underscores reduced pricing as a means of market expansion. Perhaps counter-intuitively, COOs at schools that charge a premium for online programs are no more likely than average to cite online as a net revenue source and are somewhat more likely to position online education as a net cost. This is consistent with higher costs being most often cited as the rationale for higher prices. Premium-price online programs may often be justified in terms of quality rather than margin.

TEACHING AND LEARNING

The CHLOE 4 Survey attempts to transcend the generic "online learning" to explore differences in how online courses are developed and in the online student experience. As online higher education has grown in breadth and scale, and as competition has increased, greater diversity of online styles and approaches might be expected.

CHLOE 4 revisited some teaching and learning questions, set aside others, and added new ones:

- Online course development arrangements
- Online student interactions
- Proctoring of online courses
- Prevalence of cheating in online courses

Course Development Models

Figure 28 revisits a commonly posted CHLOE question about what the COO regards as the primary online course development model at their institution. This foundational question was repeated to test for associations with responses to other questions.
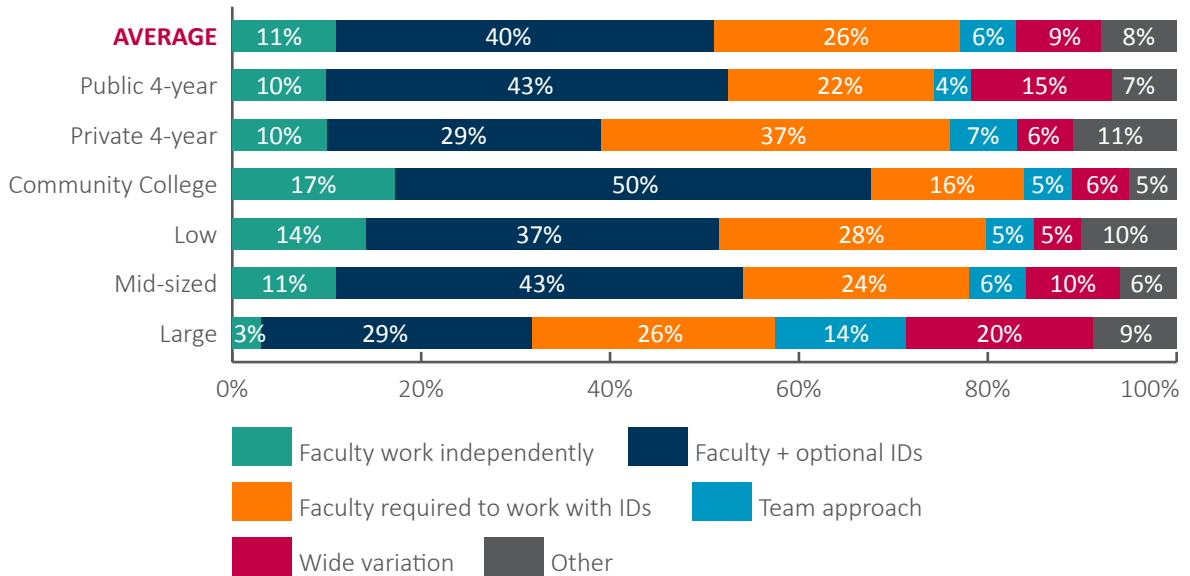
Compared to CHLOE 3 findings, CHLOE 4 results highlight stability. The overall response distribution is almost identical between the surveys. There was a small increase in the ratio of COOs that said faculty are typically required to work with instructional designers. Virtually no COOs said that contracting out was the dominant model, down from the prior year. As with CHLOE 3, the vast majority of "other" responses were variations on one of the main options.

The differences by sector or online enrollment scale remain striking. Community colleges are by far the most likely to indicate that "faculty + optional instructional design support" is the dominant model, and least likely to say that such collaboration is required, despite this sector being in many respects the most mature online. Resource constraints, not least a shortage of instructional designers, is the obvious explanation.

Figure 28: Online Course Development Spans the Artisan-Team Continuum

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

	Faculty work independently	Faculty + optional IDs	Faculty required to work with IDs	Team approach	Wide variation	Other
AVERAGE	11%	40%	26%	6%	9%	8%
Public 4-year	10%	43%	22%	4%	15%	7%
Private 4-year	10%	29%	37%	7%	6%	11%
Community College	17%	50%	16%	5%	6%	5%
Low	14%	37%	28%	5%	5%	10%
Mid-sized	11%	43%	24%	6%	10%	6%
Large	3%	29%	26%	14%	20%	9%

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

By contrast, COOs at private four-year nonprofit schools are most likely to say a faculty + ID partnership requirement is in place. This sector is diverse, so averages can be misleading, but a combination of often relatively small-scale online operations set apart from mainstream academics, and less prevalent faculty unions, may account for this difference. Research institutions, public and private, were most likely to report wide variation by department or program but interestingly also least likely to say that faculty tend to develop solo. The latter is consistent with well-resourced institutions that may be more likely to have a variety of central support services available.

Online enrollment scale also stands out as a variable: schools with greater than 7,500 online students are least likely to leave online course development to faculty working independently, and most likely to cite both a team-based approach and wide variation. Once again, this is consistent with the combination in this category of online-centric institutions with systematized online programs and operations, and large schools dominated by traditional-aged, on-campus-based students who take a growing array of online courses, and that offer plenty of online degree programs, too.

Is there any association between the approach to online course development and pricing? Figure 29 contrasts the development distribution of schools at which online programs are always or generally priced lower than on-campus-based equivalents with that of the rest of the sample.

Figure 29: Coordinated Online Course Development Associated with Lower Prices

Dominant Online Course Development Approach vs. Online Pricing
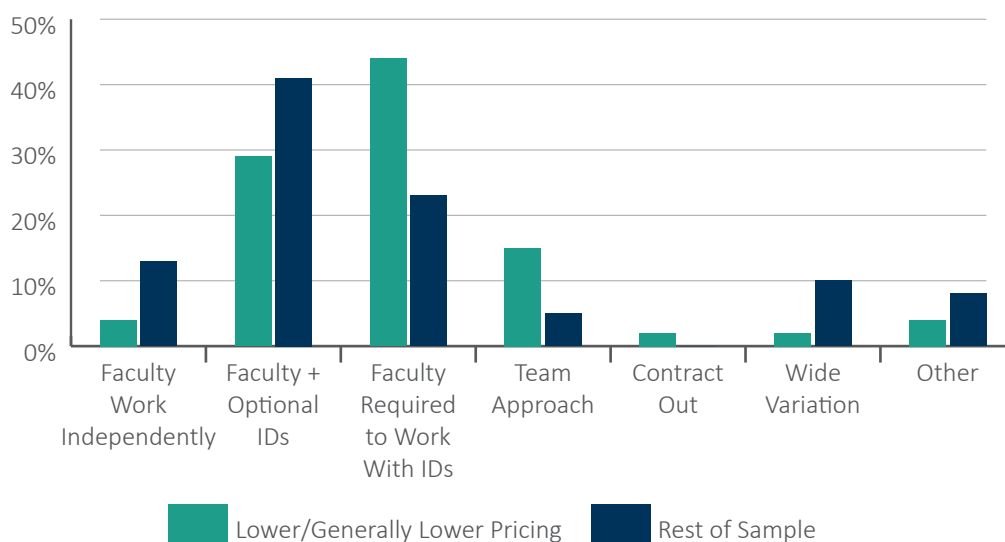
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

There is an intriguing correlation between lower pricing and greater coordination of online course development. About 60% of schools that generally price online programs lower than any on-campus equivalent report that faculty must partner with IDs or others when developing online courses, compared to below 30% for the rest of the sample.

Lower prices demand rigorous cost visibility and control if they are to be sustainable. Loose online course development processes inhibit such oversight. Figure 29 adds weight to the argument that the evolution of online learning requires more systematic approaches to design, development, and operations. Inconsistent arrangements may respect faculty autonomy but tend to drive up costs, risk uneven quality, and mean students pay more.

Range of Learning Activities in Typical Online Courses

The CHLOE 3 Report attempted to characterize the mix of student activities in the typical online course. It is not possible to understand this through direct observation of individual online courses across such a substantial sample, so CHLOE relies on the perception of chief online officers. Some COOs may have more insight than others into this dimension of online education at their institution.

In summary, according to COOs, about half of online student time was spent interacting with course materials, while approximately 20% of their time was spent with both other students and faculty or instructors, and the remainder of their time was spent with other kinds of staff (e.g., advisors, coaches). CHLOE 3 also found relatively little activity mix variation by sector or enrollment scale.

In pursuit of consistent interpretation, the CHLOE 4 Survey repeated the question but added more detailed definitions of each activity type:

- **Course Materials Definition:** Study of and interaction with course materials and student work on assignments with or without automated self-testing, AI interaction, and learning analytics feedback
- **Other Students Definition:** Student-to-student communication on discussion boards and in study groups, joint or team projects, and/or peer-to-peer coaching or evaluation activities
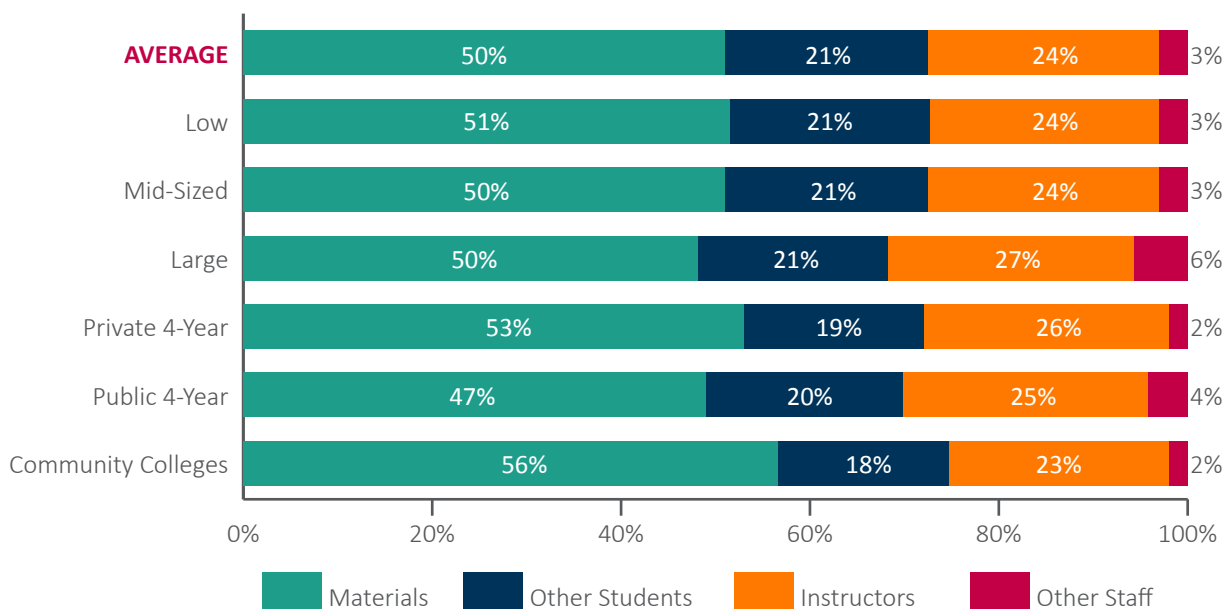
- **Instructors Definition:** Direct communication with the instructor in or out of class, and/or submission of coursework, student responses to faculty discussion posts, and assignments and exams specifically for evaluation as communicated back by the instructor to the student

- **Other Staff Definition:** Course and/or program-related communication between students and non-instructor-level advisers, coaches, and mentors

Did clearer definitions change results? See Figure 30.

Figure 30: The Curious Uniformity of Engagement Strategies in Online Courses

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?

	Materials	Other Students	Instructors	Other Staff
AVERAGE	50%	21%	24%	3%
Low	51%	21%	24%	3%
Mid-Sized	50%	21%	24%	3%
Large	50%	21%	27%	6%
Private 4-Year	53%	19%	26%	2%
Public 4-Year	47%	20%	25%	4%
Community Colleges	56%	18%	23%	2%

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

No—the results are essentially identical. Once again, the community college average for "materials" is a little higher, consistent with fewer resources. Research institutions—not shown in Figure 30—also hew closely to the CHLOE 4 average. As with CHLOE 3, behind the averages are diverse interaction distributions at the institutional level. There are examples of schools where student interaction with materials, instructors, or peers dominate online course time, as well as many different combinations (see Figure 31).

How to read Figure 31? Using the "Materials" bar as an example, only 4% of CHLOE respondents said that less than 20% of student time in a typical online course is devoted to materials, 16% say the ratio is between 20-39% of student time, 55% say 40-59% of student time, and 24% say in excess of 60%.

Figure 31: The Diversity of Online Student Engagement

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?
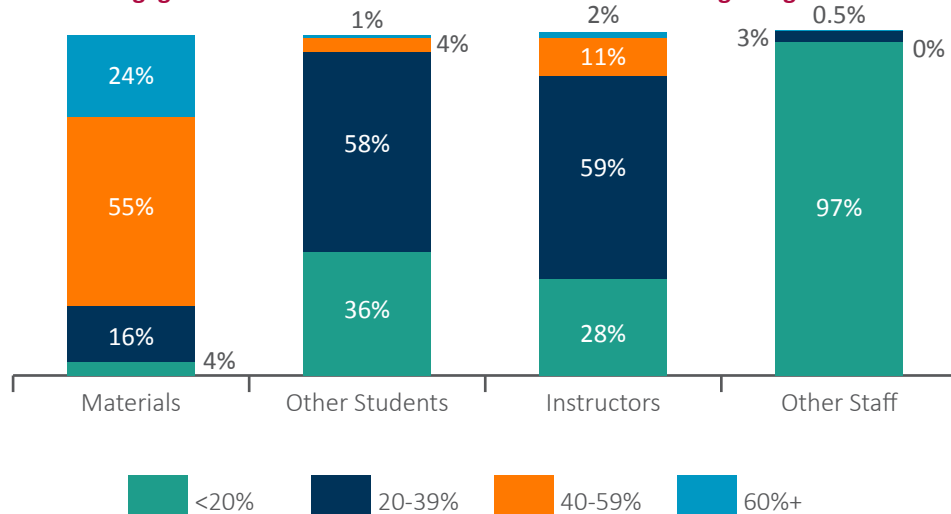
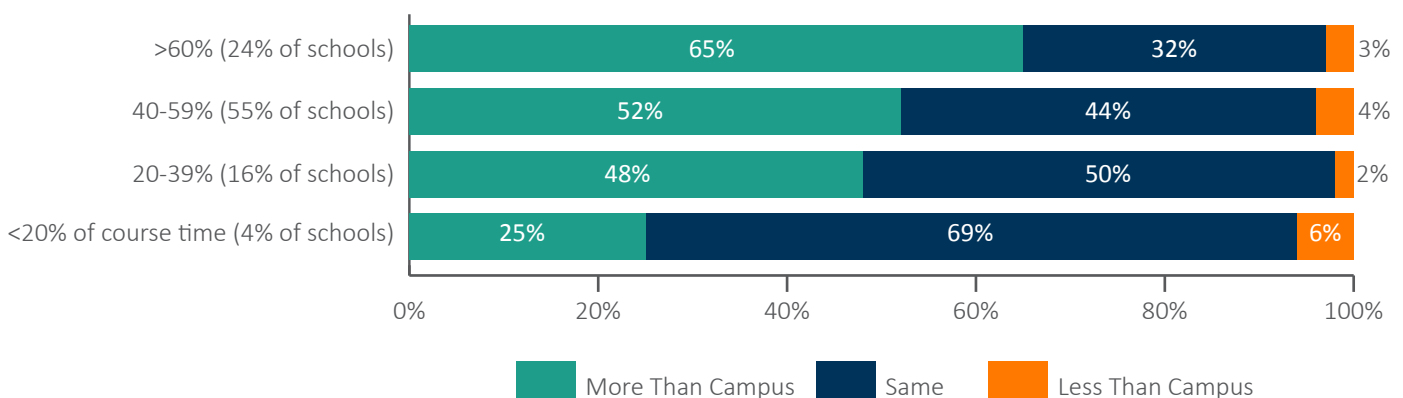Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

"Materials" is the only type of interaction that a majority of CHLOE 4 respondents say accounts for more than 40% of online student time at their institution and the only type that a significant minority of COOs says constitutes more than 60% of online student course time. It is rare for interaction with staff other than instructors to take up more than 20% of online student course time.

How do COOs think the typical online student time mix at their school compares to the mix for the typical on-campus student? Figure 32 shows the results for interaction with materials.

The higher the ratio of online student time spent interacting with materials, the more likely COOs are to say that this ratio exceeds that for the typical campus-based student. About 80% of schools report that at least 40% of student interaction in a typical online course is devoted to materials. Regardless of the online student materials interaction ratio, however, a significant proportion of COOs report that this is in line with the on-campus norm. Rarely does a COO think the campus-based students tend to spend more time interacting with materials than their online counterparts.

Figure 32: Materials Play an Outsized Role in Online Courses

How does the prevalence of student interaction with course materials in a typical online course at your institution compare to the prevalence of materials in an equivalent on-ground course at your institution?

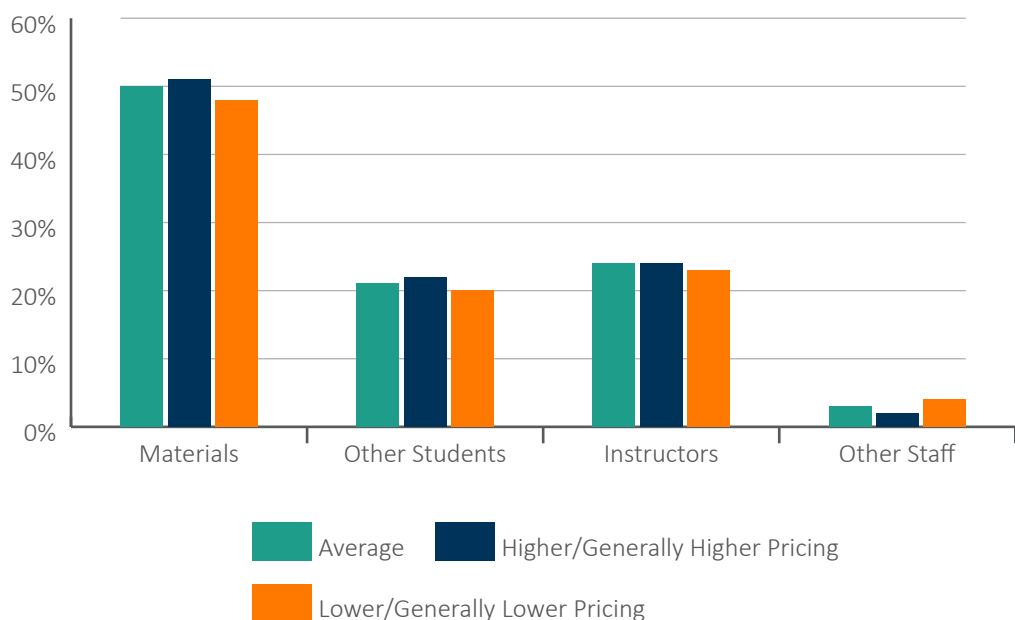Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

When it comes to interaction with peers and instructors, COOs are more likely to say that on-campus students get extra time, but there are plenty of exceptions. Interaction with other staff exhibits the least divergence by delivery mode, according to COOs.

In summary, CHLOE 4's examination of patterns of online student interaction is useful but limited. The survey relies on the opinions of COOs in the absence of more direct evidence, and despite clearer definitions it is likely that individual respondents interpret similar arrangements differently, muddying the data. The typical online course appears to be more materials-centric than the typical on-campus one, but both modalities, on average and at the institutional level, warrant additional characterization if important nuances and possibilities are to be understood.

CHLOE 4 also found the same correlation between online course development approach and activity mix seen in CHLOE 3 results: the more collaborative and coordinated the former, the more diversified the latter. Ironically, at schools where the dominant approach is for faculty to design online courses independently, the typical online course involves students spending more time than average with materials and less time with faculty. Courses developed via a team-based approach result in the greatest amount of student and faculty interaction (30% vs. the 24% average) and more time with other staff (6% vs. a 3% average).

Is there an association between online pricing and typical online course student activity distribution? Might lower prices demand less expensive human interaction and more time with materials? Figure 33 shows no such pattern.

Figure 33: The Elusive Relationship Between Online Course Design and Price

Dominant Online Course Development Approach vs. Online Pricing

Unlike online course development approach, where there is a strong association between greater coordination and collaboration and lower pricing, Figure 33 reveals no association between the student activity mix in the typical online course and online program pricing.

Generally speaking, more self-paced online courses, where students largely interact with materials, are less expensive to deliver than those that involve extensive interaction with human instructors. On the

other hand, cutting edge adaptive materials may be relatively costly to purchase, customize, and maintain, while teaching assistants (TAs) and adjunct faculty, widely deployed in instructor-led online courses, are paid a lot less than full-timers.

The student activity options in Figure 33 may be too crude to account for different cost trajectories. More information is needed about the nature of online course materials and the nature of instructors and other staff if a clearer picture of online course specifics and cost implications is to emerge. A key question for COOs is whether investment in adaptive learning and other sophisticated self-paced tools both improve student engagement and lower costs. The online student activity profile of lower-priced schools looks identical to that of schools that price online the same or higher than campus equivalents. The unavoidable economies that define any sustainable cut-price approach—unless the institution simply accepts a smaller margin—require additional lines of questioning that must be left to a future CHLOE Survey.

The CHLOE 4 Survey re-ran the measures of student engagement question from the prior year and found almost identical results. Student assignments and discussion board posts—frequency and quality—were the most used. Unlike student interaction mix, there was no association between measure of student engagement and dominant online course development approach.

In response to a question about relative student flexibility in course selection—lock-step programming at one extreme (score of 1) and complete personalization on the other (score of 5)—46% of the CHLOE 4 sample rated a typical online program at their institution as a 4 or 5, 34% about a 3, and 21%, a 1 or a 2. Community colleges were more likely report greater flexibility, and four-year privates were least likely to do so; but there was considerable response variation. There are no associations between relative course selection flexibility and student interaction mix or online course development approach.

Proctoring and Perspectives on Online Cheating

New questions on the CHLOE 4 Survey concerned proctoring of online courses and whether cheating is more prevalent among online students. Figure 34 shows the most common proctoring arrangements for online courses.

Figure 34: Proctoring Arrangements for Online Courses Vary Widely

Proctoring and student authentication practices –
Select the most common practice for your online courses

- Live Campus Proctoring Required
- Tech-Assisted Campus Proctoring Required
- Option of Live Remote Proctoring
- Option of Tech-Assisted Remote Proctoring
- Tech-Only Remote Proctoring Required
- Wide Variation
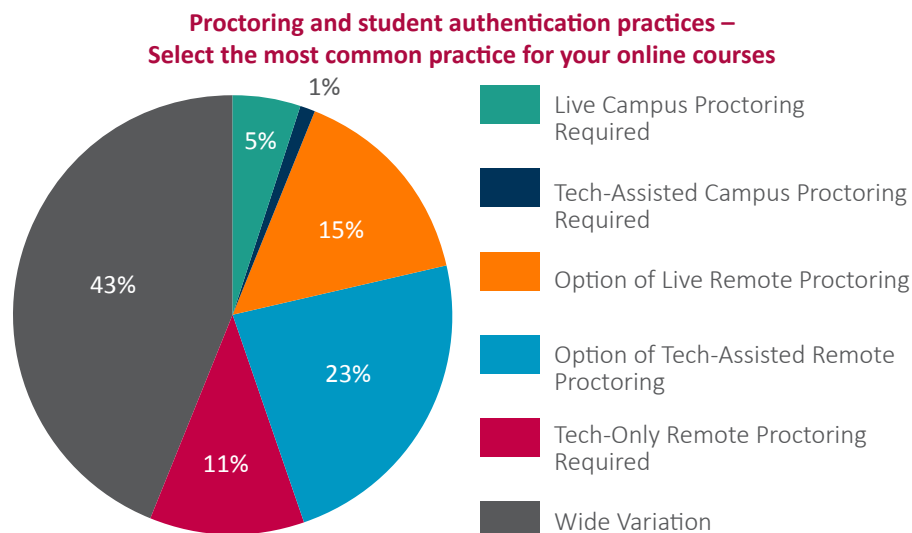
Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Required proctoring methods are the exception: the majority of COOs cite options and variation by program type and circumstances. Only 5% of schools require all online students to submit to live, in-person proctoring, and only 11% require tech-only remote proctoring. There are no strong associations with sector or online enrollment scale. The most common remote proctoring methods used are photo ID verification (used by 51% of schools), video recording (45%), and workstation monitoring (44%). Least used is facial recognition and biometrics, at only 14%.

There has long been an assumption, given the physical distance between student and instructor, that online education offers greater scope for student cheating. Chief online officers offer a mixed view (see Table 14).

Table 14: Prevalence of Cheating in Online Courses

Cheating Prevalence in Online Courses	Improving	Stable	Getting Worse	Wide Variation by Program
Very Common	0.5%	1.6%	0.3%	N/A
Common	9%	11%	2%	N/A
Uncommon	4%	44%	2%	N/A
Wide Variation by Program	N/A	N/A	N/A	25%

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

About half of COOs think online cheating is uncommon, and very few in that group think things are getting worse. About 20% believe that cheating is common, but close to a majority of this group see improvements. Less than 3% of the sample regards cheating in online courses at their institutions as very common. About a quarter of the sample say the situation varies widely by program. Field of study, student type and level, and, no doubt, assessment methods all likely contribute to the relative prevalence of cheating.

Schools with large online enrollment were more likely (11% vs. 4% sample average) to say that cheating is becoming more of a problem. A comparison to online course development methods produced no strong correlation with reported incidence of cheating.

CHLOE 4 respondents—or the 98% of COOs that enroll both online and on-campus students—generally agree (70%) that cheating is equally common (or uncommon) among online and campus-based students. Extremes of the sample disagree, but in more or less equal proportions: 15% say the problem is more widespread among online students, and 13% say the opposite.
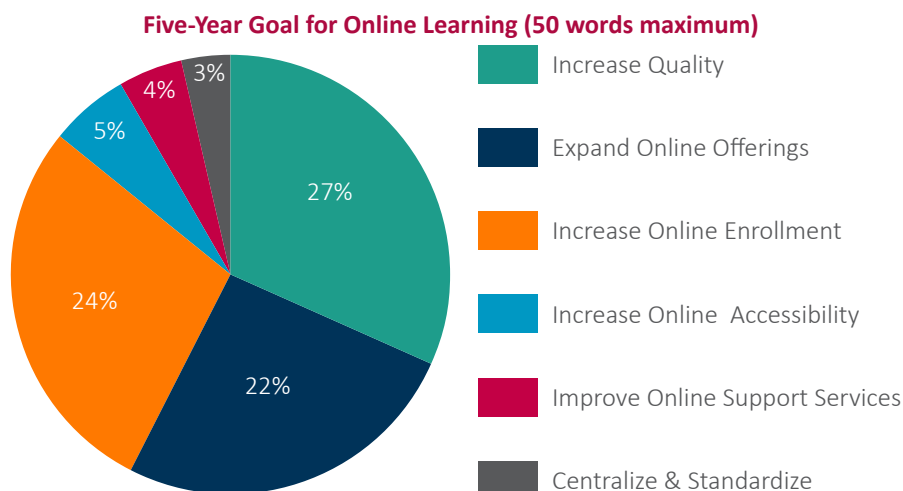
FIVE-YEAR INSTITUTIONAL GOALS FOR ONLINE LEARNING

In the CHLOE 4 Survey, COOs were asked to identify the highest priority goal for their institution's online programs over the next five years. COOs were afforded an unstructured text response (with a 50 word limit). As might be expected, top goals covered many of the challenges faced by institutions and online leaders in this relatively young and developing field, and many COOs did not limit their response to a single goal. Word-frequency analysis and other strategies were used to interpret over 300 such responses. The leading results are captured in Figure 35.

Figure 35: Top Five-Year Institutional Goals for Online Learning

(Based on CHLOE 4 Text Responses)

Five-Year Goal for Online Learning (50 words maximum)

Legend:
- Increase Quality
- Expand Online Offerings
- Increase Online Enrollment
- Increase Online Accessibility
- Improve Online Support Services
- Centralize & Standardize

Source: Eduventures Research and Quality Matters, CHLOE 4, 2020

Somewhat unexpectedly, the most frequently mentioned goal (27% of the sample) was increasing quality. Reading the comments more closely, "quality" is actually used as an umbrella term for a variety of goals. Breaking down the quality references, 47% refer to overall online program quality, and another 39% are focused on improving course quality. Thirteen percent express the goal of meeting external, nationally recognized, quality standards, such as the Quality Matters Rubric or the OLC Quality Scorecard, and 8% hope to improve the quality of the student learning experience. Some (8%) lament the lack of consistent standards and practices in their online programs and define their quality goal as achieving consistency across their online curriculum, policies, and practices.

The second and third most frequently mentioned goals, increasing online enrollment (24%) and expanding online offerings (i.e., courses and/or programs) (22%), echo the priority findings in each of the previous CHLOE surveys.

Rounding out the most common responses, only 5% of COOs cite increasing the accessibility of their online programs and services as their top priority, which may be hard to reconcile with the more than 40% who acknowledged that their programs are not currently fully accessible. Another 4% want to improve their online support services, and 3% hope to standardize and achieve consistency among their widely variable standards and practices, mirroring the goal that others described as a quality initiative.

A small fraction of respondents cite other interesting goals, demonstrating the complexity and wide-ranging challenges of online learning. Here are a few goals cited in less than 2% of responses:

- Provide faculty support and professional development for online instruction
- Increase institutional capacity to establish sustainable growth and learning
- Improve and streamline the online course and program development process

FIVE-YEAR CHIEF ONLINE OFFICER PERSONAL GOALS

In CHLOE 4, the study provided an opportunity for COOs to share their personal goals for the next five years. This was an open-ended question rather than a list of options, and the results reflect a broad assortment of responses. Our coding of this qualitative data yielded many themes for goals, but no theme spanned more than 12% of the respondents. The top responses to this question are listed below:

- Maintain and/or increase the quality of online learning ("quality") (12%)
- Provide faculty support and training/professional development for online instruction (9%)
- Increase student success and engagement/student support of online students (7%)
- Increase collaboration and consensus across different constituencies (6%)
- Develop professionally and/or further my education/increase knowledge (6%)
- Increase number of online programs/expand offerings (6%)
- Increase standardization/centralization of online learning/establish online/virtual campus (6%)

It is interesting to note that, while the question focused on personal goals, all but one of the top seven responses were more organizational or operational in nature. Professional or personal development is represented in the fifth slot on this list. Comparing the rest of this list to the separately listed institutional goals, shows consistency in the number of responses related to increasing quality. The other top responses on the list of institutional goals are focused on expanding online offerings and increasing online enrollment. Some of the other top responses for personal goals might be viewed as supporting or enabling those institutional goals. This list may be of value to professional associations that are engaged in professional development and networking opportunities for these online learning leaders.

LOOKING TOWARD CHLOE 5

The CHLOE Project is planning a major departure from its pattern of reporting on the wide range of online learning topics each year. Beginning in 2020, we will focus on a cluster of topics related to a single major issue. This approach will allow more in-depth coverage of currently urgent issues and, incidentally, shorten the survey instrument we ask our COO respondents to complete each year. After several reports of this nature, CHLOE will periodically return to the broader survey to update our basic findings and identify important trends. The first focused survey will assess the state of the online program market:

Online Program Market Growth: Limitless Potential or Imminent Slowdown?

The words "online learning" and "enrollment growth" are often used in the same sentence. As a medium for delivery of learning, the online or blended course is an established component of higher education for both residential and distant students, and its further applications seem unlimited. Yet, the future growth of fully online study may be more problematic. In a climate of enrollment and budgetary challenges for higher education overall, the dramatic growth of fully online enrollment over the past decade has encouraged schools of all types to turn to online delivery in search of new markets and precious revenue. Are these expectations realistic or might we be headed toward an oversupply of online programs?

CHLOE 5 will gather perspectives from a wide range of colleges and universities about today's online market realities: Is there still potential for ever-more schools to benefit from major investment in fully online offerings, or is slowing year-over-year online enrollment growth an indication that the market is becoming saturated? CHLOE 5 will explore online market dynamics such as:

- Fully online enrollment over the past decade (IPEDS analysis)
- How much further growth current providers anticipate

- Recent and new providers seeking a share of online enrollment
- Where the greatest enrollment growth potential lies
  - o Undergraduate versus graduate programs
  - o Fully online versus hybrid or blended models
  - o Degrees versus certificates and micro-credentials
  - o Major fields of study, and up-and-coming areas
- Measuring student demand
  - o Student types (e.g., demographics, prior credit)
  - o Specific markets and populations (e.g., B2B, military and veterans)
  - o Local, regional and international enrollment
- The online learning value proposition as a driver of enrollment

We hope that our COO respondents will continue to support CHLOE with their insights and expertise as we continue to evolve the survey to address issues of critical importance to online learning. If you are a chief online officer not yet participating in the CHLOE Survey or know of other chief online officers who may not be on our roster, please contact Barbra Burch at Quality Matters (bburch@qualitymatters.org).

ACKNOWLEDGEMENTS

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