QM | CHLOE 8 BEHIND THE NUMBERS | encoura Eduventures Research

Five Online Learning Models: WHERE DOES YOUR INSTITUTION FIT?

Based on: CHLOE 3: Behind the Numbers – The Changing Landscape of Online Education - 2019
(Sample size: 280 2-year and 4-year institutions)

Read across each row to compare models. Read down a column to profile each model

	Community College Model	Low-Enrollment 4Y Model	Regional 4Y Public Model	Regional 4Y Private Model	Enterprise Model
Defining Criteria	2-year public institutions with less than 7,500 fully and partly online students	4-year public and private institutions with fewer than 1,000 fully and partly online students	4-year non-flagship public institutions with between 1,000 and 7,500 fully and partly online students	4-year private, nonprofit institutions with between 1,000 and 7,500 fully and partly online students	2 & 4-year public, private nonprofit, and for-profit institutions with more than 7,500 fully and partly online students
Average Number of Online Degree & Certificate Programs	12	16	18	18	60
Distribution of Students by Extent of Online Study	62% Partly Online, 38% Fully Online **COMMUNITY COLLEGES** Students taking some online outnumber exclusively online students	76% Partly Online, 24% Fully Online **LOW ENROLLMENT** More than 3 out of 4 online students mix online & on-ground courses	69% Partly Online, 31% Fully Online **REGIONAL PUBLICS** Nearly 7 in 10 online students mix online & on-ground courses	42% Partly Online, 58% Fully Online **REGIONAL PRIVATES** Only Regional NY Privates with more fully online than on-ground students	55% Partly Online, 45% Fully Online **ENTERPRISE** Wide variation including some that offer only online courses
Distribution of Online Students by Level of Study	100% Undergraduate **COMMUNITY COLLEGES** Online students are mostly lower division undergrads	72% Undergraduate, 28% Graduate **LOW ENROLLMENT** Almost three out of four online students are undergraduates	77% Undergraduate, 23% Graduate **REGIONAL PUBLICS** More than three out of four online students are undergraduates	45% Undergraduate, 55% Graduate **REGIONAL PRIVATES** Only Regional NY Privates report a majority of online graduate students	80% Undergraduate, 20% Graduate **ENTERPRISE** Four out of five students are undergraduates
Spring 2018 Online Enrollment Compared to Spring 2017	56% Decreased, 30% Unchanged, 14% Increased **COMMUNITY COLLEGES** There were winners & losers in 2018, but overall growth was modest	45% Decreased, 49% Unchanged, 5% Increased **LOW ENROLLMENT** Few schools show significant online growth in 2018	67% Unchanged, 27% Decreased, 6% Increased **REGIONAL PUBLICS** Experienced strong online growth in 2018	67% Decreased, 18% Unchanged, 15% Increased **REGIONAL PRIVATES** Produced winners & losers, but overall 2018 growth was strong	78% Increased, 8% Unchanged, 14% Decreased **ENTERPRISE** A higher % of Enterprise schools grew in 2018 than in any other model
Greatest Source of Online Competition	46% Local, 34% Regional, 20% National **COMMUNITY COLLEGES** Focus on local competition	36% Local, 38% Regional, 27% National **LOW ENROLLMENT** Schools have most varied view of competition	13% Local, 60% Regional, 27% National **REGIONAL PUBLICS** Focus is on regional competitors	21% Local, 29% Regional, 50% National **REGIONAL PRIVATES** National competition is a marginally greater concern	10% Local, 30% Regional, 60% National **ENTERPRISE** Schools that recruit nationally focus on national competition
Priority in Online Curriculum Development	10% Online Courses, 22% Courses & Programs, 55% Online Programs, 9% Wide Variation **COMMUNITY COLLEGES** The primary focus is on building online courses	31% Online Courses, 18% Courses & Programs, 33% Online Programs, 20% Wide Variation **LOW ENROLLMENT** The model is split between online course & program priorities	33% Online Courses, 17% Courses & Programs, 22% Online Programs, 14% Wide Variation **REGIONAL PUBLICS** Are split between online course & program priorities	54% Online Programs, 18% Courses & Programs, 8% Online Courses, 2% Wide Variation **REGIONAL PRIVATES** Primary focus is on building online programs	56% Online Programs, 17% Courses & Programs, 13% Online Courses, 13% Wide Variation **ENTERPRISE** The model is strongly focused on building online programs
Primary Emphasis in Course Design	61% Fully Online, 13% Balance Online and Blended, 4% Blended, 4% No Emphasis **COMMUNITY COLLEGES** A blended approach is curiously underused with local student body	44% Fully Online, 9% Balance Online and Blended, 16% Blended, 12% No Emphasis **LOW ENROLLMENT** Schools show the widest application of blended learning	70% Fully Online, 3% Balance Online and Blended, 9% Blended, 6% No Emphasis **REGIONAL PUBLICS** One in five invest in alternatives to fully online courses	66% Fully Online, 15% Balance Online and Blended, 9% Blended, 3% No Emphasis **REGIONAL PRIVATES** A third invest in alternatives to fully online courses	86% Fully Online, 0% Balance Online and Blended, 0% Blended, 8% No Emphasis **ENTERPRISE** Only fully online courses meet the scaling demands of Enterprise programs
Commitment to Alternative Credentials Reflect:	0% Major Investment, 21% Some Investment, 17% Experimenting, 33% Some Interest, 29% No Current Interest **COMMUNITY COLLEGES** Many seem on the fence regarding alternative credentials	4% Major Investment, 16% Some Investment, 12% Experimenting, 36% Some Interest, 32% No Current Interest **LOW ENROLLMENT** Two-thirds of programs are on the sidelines regarding alternative credentials	6% Major Investment, 28% Some Investment, 22% Experimenting, 36% Some Interest, 14% No Current Interest **REGIONAL PUBLICS** Half are actively engaging with alternative credentials	9% Major Investment, 36% Some Investment, 27% Experimenting, 18% Some Interest, 12% No Current Interest **REGIONAL PRIVATES** Are substantially invested in developing alternative credentials	3% Major Investment, 56% Some Investment, 19% Experimenting, 14% Some Interest, 8% No Current Interest **ENTERPRISE** Likeliest to embrace a range of alternative credentials in the short term
Online Student Performance Compared to On-Ground	3% Better Online, 40% Both the Same, 56% Worse Online **COMMUNITY COLLEGES** Struggle with students underprepared for digital learning	24% Better Online, 60% Both the Same, 17% Worse Online **LOW ENROLLMENT** Schools with varying degrees of selectivity have mixed results with online students	13% Better Online, 81% Both the Same, 6% Worse Online **REGIONAL PUBLICS** Have reached parity between online and on-ground student performance	25% Better Online, 44% Both the Same, 31% Worse Online **REGIONAL PRIVATES** Online students at more than two-thirds of schools achieve comparable or better performance than on-ground peers	11% Better Online, 74% Both the Same, 16% Worse Online **ENTERPRISE** Three quarters programs report comparable performance of online & on-ground students
Focus of Online Management & Budget Control	69% Centralized, 19% Distributed, 4% Wide Variation **COMMUNITY COLLEGES** More than two-thirds centralize management of their online programs	56% Centralized, 22% Distributed, 14% Wide Variation **LOW ENROLLMENT** Only a little over half of online programs have taken steps to centralize	74% Centralized, 14% Distributed, 6% Wide Variation **REGIONAL PUBLICS** Three-quarters of schools centralize online management	81% Centralized, 6% Distributed, 6% Wide Variation **REGIONAL PRIVATES** Centralized online management is the rule in the great majority	80% Centralized, 8% Distributed, 3% Wide Variation **ENTERPRISE** Nearly nine out of ten centralize online management

DOWNLOAD *CHLOE 3: BEHIND THE NUMBERS*

qualitymatters.org/qa-resources/resource-center/articles-resources/CHLOE-3-report-2019

encoura.org/project/chloe-3-behind-the-numbers