Distance Education in 2022: A Perspective on the Ever-Changing Landscape

Keynote Speaker: Phil Hill (@PhilOnEdTech)
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A Perspective on the Ever-Changing Landscape

July 13, 2022


Phil Hill (@PhilOnEdTech)
% of US Higher Ed Enrollment, Fall 2012 - 2020
of Students Taking At Least One (ALO) Online Course
Source: IPEDS database

No DE Courses:
- 2011: 26.1%
- 2012: 27.1%
- 2013: 28.4%
- 2014: 29.9%
- 2015: 31.8%
- 2016: 33.7%
- 2017: 35.3%
- 2018: 37.3%
- 2019: 62.7%
- 2020: 74.1%
- 2021: 74.1%

At Least One DE Course:
- 2011: 73.9%
- 2012: 72.9%
- 2013: 71.6%
- 2014: 70.1%
- 2015: 68.2%
- 2016: 66.3%
- 2017: 64.7%
- 2018: 62.7%
- 2019: 25.9%
Multiple Phases of Higher Education Response to COVID-19

**Phase 1:** Rapid Transition to Remote Teaching & Learning
- North America and many other regions transition to fully-remote teaching and learning in just 3 - 4 weeks, with huge reliance on synchronous video (e.g. Zoom, MS Teams, Google Meet)
- Feb - Mar 2020

**Phase 2:** (Re) Adding Basics
- Institutions must (re) add basics into emergency course transitions: course navigation, equitable access including lack of reliable computer and broadband, support for students with disabilities, academic integrity
- Apr - Jul 2020

**Phase 3:** Extended Transition During Continued Turmoil
- Institutions must be prepared to fully support students for a full term, and be prepared for online delivery - even if starting as face-to-face
- Aug 2020 - Spring 2021

**Phase 4A:** Re-integration
- Difficult transition to add back large % of face-to-face education as pandemic restrictions ease
- Spring - Fall 2021

**Phase 4B:** Emerging New Normal
- Unknown levels of online learning adoption in new normal, but likely higher than pre-2020
- 2022 & Beyond

Outlook as of April 2021
MindWires Model of US Higher Education Enrollment by Adjusted Sector 2012 - 2022
IPEDS data for Fall 2012 - Fall 2020; NSC extrapolations for 2021 - 2022
Negates sector changes since 2012 for community colleges adding 4-year degrees and for nonprofit conver

Covid Pandemic / Endemic

Public 4-year
Public 2-year
Private 4-year
For-profit 4-year
For-profit 2-year
Private 2-year
We are in the midst of an inflection point in higher education driven by mainstream adoption, the pandemic, new business models, and a move beyond the digitization of traditional classroom.
We are in the midst of an inflection point in higher education driven by mainstream adoption, the pandemic, new business models, and a move beyond the digitization of traditional classroom.
three children playing happily together

Photo Credit: www.mummymummymum.com
Everett Rogers: diffusion is the process by which an innovation is communicated over time among the participants in a social system
## Penn State Report on Online Program Management (OPM) Market

### Figure 1: The Production of Online Education: Central Tasks

<table>
<thead>
<tr>
<th>Student Enrollment Cycle</th>
<th>Prospect</th>
<th>Enrolled and Re-enrolled</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Obtaining Students</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Market Analysis</td>
<td>General Marketing</td>
<td></td>
</tr>
<tr>
<td>Identifying Prospective Students</td>
<td></td>
<td>Recruiting Identified Prospects</td>
</tr>
<tr>
<td><strong>Instructing Students</strong></td>
<td></td>
<td></td>
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<tr>
<td>Program &amp; Course Planning</td>
<td>Course Development</td>
<td>Course Delivery (delivery of instruction)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Student Performance Assessment</td>
</tr>
<tr>
<td><strong>Supporting Students &amp; Instruction</strong></td>
<td>General Administration</td>
<td>Enrollment Management (Financial Aid, Veteran Benefits, Registrar)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Academic and Career Planning Learning Support Student Life</td>
</tr>
</tbody>
</table>

Note: each box represents an activity related to online education
Trends – OPM’s

Revenue Sharing

Fee for Service & Other Fiscal Models

Abuses

Regulations
Communication Transactions

- Messages
- Updates
- SITREPs
- New data, maps, information
- Requirements, problems, new issues
- Validation or clarification
- Advisories and warnings
- Official statements
Source: http://californiacommunitycolleges.cccco.edu
Clear Focus on Restricting For-Profits

• Witness DeVry U borrower defense and personal naming of CEO and President by ED

• Forcing University of Phoenix president to step down based on ED questions on Westwood

• Very consistent with regulatory public priorities

• Simply put, expect continued targeting of for-profits, requiring solid finances and sustainable enrollments to survive
State Attorneys General

• “We are pleased to see that the Department of Education’s most recent version of Issue Paper 6 concerning certification includes a basic requirement that programs comply with consumer-protection laws applicable to higher education in the states where students reside (to be promulgated as 34 C.F.R. § 668.14(b)(32)).”

• “We wish to express... our strong disagreement with the notion that institutions soliciting enrollment online are subject to sufficient consumer protections under reciprocity arrangements.”
ED Circa 2021

- James Kvaal, Under Secretary of Education
  - Previously president of The Institute for College Access & Success and Deputy Director of Domestic Policy for Obama Domestic Policy Council.

- Ben Miller, Senior Advisor to the Chief of Staff, ED
  - Previously VP for Postsecondary Education at the Center for American Progress; senior policy advisor at ED under Obama.

- Richard Cordray, Chief Operating Officer of Federal Student Aid
  - First director of the CFPB and former Attorney General of Ohio.

- Toby Merrill, Deputy General Counsel, Office of the General Counsel
  - Founded and directed the Project on Predatory Student Lending at the Legal Services Center of Harvard Law School, which represents low-income student loan borrowers in litigation against for-profit colleges and against the policies that enable them.

Aaron Lacy, Thompson Coburn, LLP
Response 2: The Department concurs with this recommendation. We agree to reinforce for institutions of higher education that the ban on incentive compensation applies to all education programs that an institution offers and all contracts that an institution enters. This will help the institutions better understand what documentation must be maintained and provided to auditors and program reviewers. The Department will amend its procedures for program reviews and propose changes to the Compliance Supplement. These modifications will identify the types of information that institutions must provide about contracts with third parties during audits and program reviews to improve enforcement of the ban on incentive compensation. The information identified will address any third-party contracts that involve recruiting activities, such as OPMs.
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