Quality & Borderless Higher Education
*Trends and Reflections*

**CHEA Conference**

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What is borderless higher education?
Researching Borderless Higher Education…

Innovation/Hype

Statistics/Insight

Online will radically improve access, lower costs and boost outcomes….

In 2017, 15% of undergrads and 30% of grad students were fully online.
Just Getting Started- bricks accommodated bulk of c.120m increase in tertiary enrollment globally between 2000 and today. Can bricks handle another 350m+ increase by 2040?

Population Not Key Driver. There is projected to be only a 12% increase in the world population aged 18-23 (by 2040), but a 164% projected increase in tertiary enrollment. Tertiary growth driven by wealth and socio-economic change- and innovation.

Starting Point. Bricks-and-mortar still king, but evidence of innovative scale at the margins

Estimated Global Tertiary Education Enrollment, 2019

Sources: estimates derived from UNESCO, OBHE, Class Central, Course Report, and national sources.
Borderless by Type: online wins the bronze?

International Tertiary Students - by Delivery Mode (2018)

Growth since 2009

Australia
- Cross-Border- Student: 643,000
- Cross-Border- "Campus": 128,000
- Cross-Border- Distance: 8,000

UK
- Cross-Border- Student: 506,000
- Cross-Border- "Campus": 332,000
- Cross-Border- Distance: 118,000

USA
- Cross-Border- Student: 872,000
- Cross-Border- "Campus": 45,000
- Cross-Border- Distance: 8,000

Source: analysis of data from DET, HESA, UUK, IIE, IPEDS. US figures exclude OPT. Australian figures include TAFE.

1% of international students
- Australia: +47%
- UK: +4%
- USA: +125%

TOTAL & GROWTH UNKNOWN
- Australia: -30%
- UK: +150%
- USA: +40%

Growth since 2009
- Australia: +47%
- UK: +4%
- USA: +125%
Right Direction? Less focus on online enrollment, latest tech; more on learning design and new credentials

**Advantages**
- Learning design
- Low cost
- Experiential, blended
- Cohort
- Education-Work
- General and specific Skills
- Quality at scale

**Risks**
- Boutique
- Too “vocational”
- Too flexible, self-paced
- Mostly degree-holders enroll
- Adds cost and time
- Just a pathway to “real” higher education
Higher Education Innovation and Quality: What is the goal?

Transcend?

Meet?
In Eduventures view, in higher education there are four types of online learning goal: **Access, Cost, Growth, Quality**. Some strategies designed to meet these goals are mainstream (inner box), while most are still emerging (outer box). Each strategy is color-coded in line with its root goal, although many strategies span more than one goal.
## How to Quality Assure Online Higher Education?
Perennial debate…

### INPUTS & PROCESS

**Strengths**
1) Mission-driven
2) Peer-based
3) Qualitative
4) Adaptable, normalize

**Challenges**
1) Hard for outsiders to grasp
2) Neglect of outcomes
3) Too drawn out, surface
4) Insufficient transparency

### OUTCOMES

**Strengths**
1) Quantitative
2) Regular, frequent
3) Notional common standards
4) Track change

**Challenges**
1) Gaming the system
2) Reductionism
3) Short-termism
4) Neglect of inputs, process
Quality Assurance Trends for Online Higher Education

**Inputs & Process**
- Council of Regional Accrediting Commissions
- NEBHE
- NC-SARA
- SREB
- MHE
g- WICHE

**Outputs**
- ENADE
  - Exame Nacional de Desempenho dos Estudantes
- CLIMB Initiative
- OECD
  - Better Policies for Better Lives
- PIAAC
  - Programme for the International Assessment of Adult Competencies
- Decision Making in a Complex and Uncertain World
  - University of Groningen via Futurelab
- Council on Integrity in Results Reporting
  - Students First

**Quality Matters**
- QM

**Teaching Excellence Framework (TEF)**
Quality & Online Higher Education: some conclusions in 2020 (U.S. and international)

- **Growing Number of Countries**: steady normalization of online under mainstream accreditation standards and procedures, beyond initial “substantive change”. **Remaining Countries**: online normalization limited but growing.
- **Voluntary Quality**: efforts like *Quality Matters* build online-specific good practice across the sector. Permanent role?
- **Geography**: online cuts across geographically-defined regulatory and quality arrangements (e.g. U.S. state authorization) and small-scale cross-border online.
- **Market**: strong non-traditional consumer support for online in the most mature higher education systems and most advanced economies; and strong consumer skepticism elsewhere (but gradually becoming more positive).
- **ROI: Access**: evidence that online does enable access from certain underrepresented groups; but also that the well-educated take most advantage of MOOCs and related programming.
- **ROI: Cost**: evidence that majority online higher education institutions can afford economies of scale and lower prices; but online programs at other types of institution tend to be costed imprecisely and priced conservatively.
- **ROI: Student Outcomes**: evidence that other things being equal, undergraduate fully online program completion rates are significantly worse than average.
- **KEY QUESTION**: how will online evolve in the next decade?
Thank you

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