



Report on 2017 Distance Education Offerings and Enrollments at Maryland Colleges and Universities

April 2019

Lawrence J. Hogan, Jr.
Governor

Boyd K. Rutherford
Lt. Governor

Maryland Higher Education Commission

Anwer Hasan, Chairman

Sandra L. Jimenez, Vice-Chair

Vivian S. Boyd

John Holaday

Vera R. Jackson

Russell V. Kelley

Ian MacFarlane

Donna M. Mitchell

Joel Packer

Rizwan A. Siddiqi

Giavanna Tserkis, Student Commissioner

John W. Yaeger

James D. Fielder, Jr., Ph.D.
Secretary

Lawrence J. Hogan, Jr.
Governor

Boyd K. Rutherford
Lt. Governor

**REPORT ON DISTANCE EDUCATION ACTIVITIES AT MARYLAND COLLEGES
AND UNIVERSITIES
CALENDAR YEAR 2017**

Table of Contents

Introduction.....	1
Survey and Methods	1
Background and Definitions	1
Detailed Survey Findings.....	3
Courses and Sections	4
Enrollment.....	8
Credit Hours.....	11
Trends in Distance Education	14
Distance Education Programs	18
State Authorization Reciprocity Agreement.....	19
Academic Common Market.....	20
Implications for Policy and Practice	20

INTRODUCTION

Maryland higher education institutions serve over 360,000 students each year, and enrollment projections indicate that the number of students will continue to grow in upcoming years. While the number of students is expected to increase, so too is the diversity of the student bodies as Maryland's population grows. Alternative educational methods, such as distance education, play increasingly important roles in serving this growing population. Understanding the role that distance education plays in serving the student population is important in determining additional ways in which these methods could be used to better serve Maryland students. This report examines distance education activities at Maryland's postsecondary institutions during Calendar Year 2017.

SURVEY AND METHODS

The Distance Education (DE) Survey was initially created to inform the Maryland Higher Education Commission (MHEC) about institutional use of distance education methods on their campuses. In 2006, the Survey was redesigned to align with the requirements of the annual Southern Regional Education Board (SREB) survey and to reduce the burden of reporting on campuses. This redesigned survey includes five mandatory questions as well as two follow-up questions.

This survey was administered in Spring 2018 and included questions regarding the number of courses taught using distance educational methods, students' type of enrollment, and credit hour completion. The information included all instructional activity from January 1, 2017 to December 31, 2017. Institutions were also asked to identify any programs that could be completed entirely via DE methods. These questions roughly correspond to the sections included in this report. Fifty institutions, including community colleges, four-year public colleges and universities, state-aided independent colleges and universities, and other private institutions responded to this survey.

BACKGROUND AND DEFINITIONS

While there are a number of different ways that distance education might be defined, MHEC follows SREB in utilizing the IPEDS definition. Under this definition, technology is the primary method of contact between the instructor and the students, and students are not physically located in the same location as the instructor. This definition excludes web-enhanced courses, which maintain standard physical meeting places and times but include electronic components designed to enhance the course content, or may allow for electronic communication between the

instructor and students. While web-enhanced courses do maintain a digital component, these would be considered traditional courses: courses in which more than 50% of the course is delivered in a traditional classroom or other physical, face-to-face location. These might include classes offered either at a main campus, or other, off-campus instructional sites.¹ This definition of DE also does not include traditional correspondence courses.

The 2018 DE Survey asked for information on three types of DE delivery methods: Online & Blended Hybrid courses; Site-to-Site, 2-Way, Audio/Video; and Other. Online & Blended Hybrid courses are those which are either delivered entirely online or include both significant (more than 50%) online and traditional, in-person elements. Site-to-Site, 2-Way, Audio/Video courses utilize compressed video to deliver course content. The Other DE category includes courses that use methods such as satellite, cable, broadcast TV or radio, video tapes, or CD-ROMs to provide instruction. This does not include correspondence courses in which significant site attendance is not required but less than half of course content is delivered electronically.

The information collected in the DE Survey includes the following information on courses, sections, credit hours, and enrollments:

- (1) Unduplicated course counts – Each unique course is counted only one time, regardless of the number of sections offered or the number of semesters in which it was taught. Additionally, if the course is offered via multiple delivery methods, it is still counted only one time;
- (2) Unduplicated student headcount enrollments – each student is counted only once during the calendar year, regardless of whether they enrolled in multiple courses;
- (3) Duplicated distance courses, sections, and enrollments – All instances of a course, section, and enrollment are counted, regardless of whether the student is enrolled in multiple semesters, the course is offered more than one semester, or multiple sections of a course are offered. Duplicated enrollments count students enrolled in multiple courses in every instance of enrollment;
- (4) Calendar year credit hours – The number of credit hours earned via each delivery method from January 1, 2017 to December 31, 2017.

Level of enrollment is reported based on student level, and not upon the level of course in which a student is enrolled. For example, while an undergraduate student may enroll in a graduate-level course, the student would still be reported as an undergraduate. This report also includes only courses that were taught during the selected semester – if a course was offered but canceled, it is

¹ For example, courses conducted at one of the State's nine regional higher education centers would be considered traditional instruction.

not included. If courses had both DE and traditional course sections, only the DE sections are included in the analysis.

The analysis included in this report focuses on variations across segments: community colleges, 4-year public institutions, state-aided independent institutions, and other private institutions. However, University of Maryland University College (UMUC) remains an outlier when examining distance education. UMUC's course offerings are almost entirely online, with the result that nearly all of their students enroll in distance education. Due to the unique nature and mission of the institution, UMUC statistics are frequently presented separately from other institutions. As a consequence, when examining distance education offerings and enrollments data are presented both for all for 4-year public colleges and universities and for all 4-year public institutions excluding UMUC.

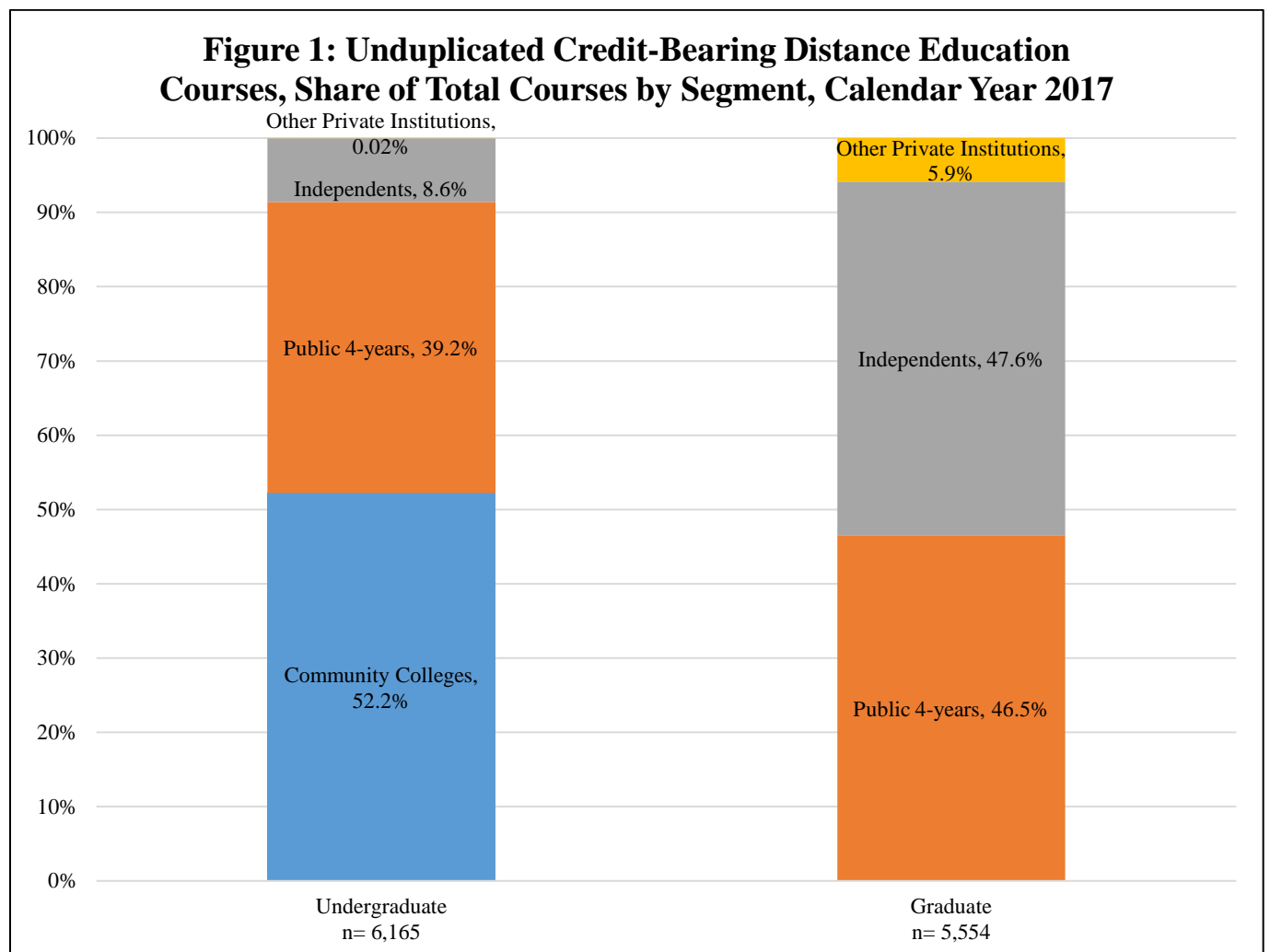
DETAILED SURVEY FINDINGS

Statewide findings from MHEC's Distance Education (DE) Survey of Calendar Year 2017 instructional activities are presented in the following four sections: (1) unduplicated course counts; (2) distance course sections and enrollments; (3) unduplicated student headcount enrollments; and (4) calendar year student credit hours.

Courses and Sections

Course Counts

As Figure 1 shows, the share of credit-bearing DE courses varies greatly across segments and between the graduate and undergraduate levels. The vast majority (91.4%) of undergraduate DE courses are offered at public institutions, with courses at community colleges comprising over half (52.2%) of all course offerings and four-year colleges and universities 39.2%. While private institutions offer nearly one-tenth of courses, these are almost all concentrated among the state-aided independent colleges and universities; only one undergraduate DE course is taught at the other private institutions. At the graduate level, however, the other private institutions play a more significant role, offering 5.9% of DE courses. This is concentrated in two institutions: Maryland University of Integrative Health, which continues to expand its online graduate course presence, and SANS Technology Institute, which offers only graduate-level work. The remaining share of DE offerings is divided nearly evenly between the four-year public (46.5%) and independent institutions (47.6%).



Course Sections

Figure 2 illustrates that a similar variation between undergraduate and graduate level offerings exists when examining course section availability. At the undergraduate level, the number of course sections is again much greater at the public institutions than the other segments, with 58.4% of course sections at the public four-year colleges and universities and 37.6% at community colleges; state-aided independent institutions account for only 4.0% of course sections. While the share of sections offered at the graduate level (37.9%) is less evenly distributed with the public four-year institutions (53.1%) than among that of unduplicated course offerings, it still represents a large shift from that at the undergraduate level. In addition, while at the undergraduate level the number of course sections offered by the other private institutions is minuscule (comprising 0.004% of all section offerings), among graduate-level courses, nearly one-tenth (9.0%) of course sections are offered by these institutions.

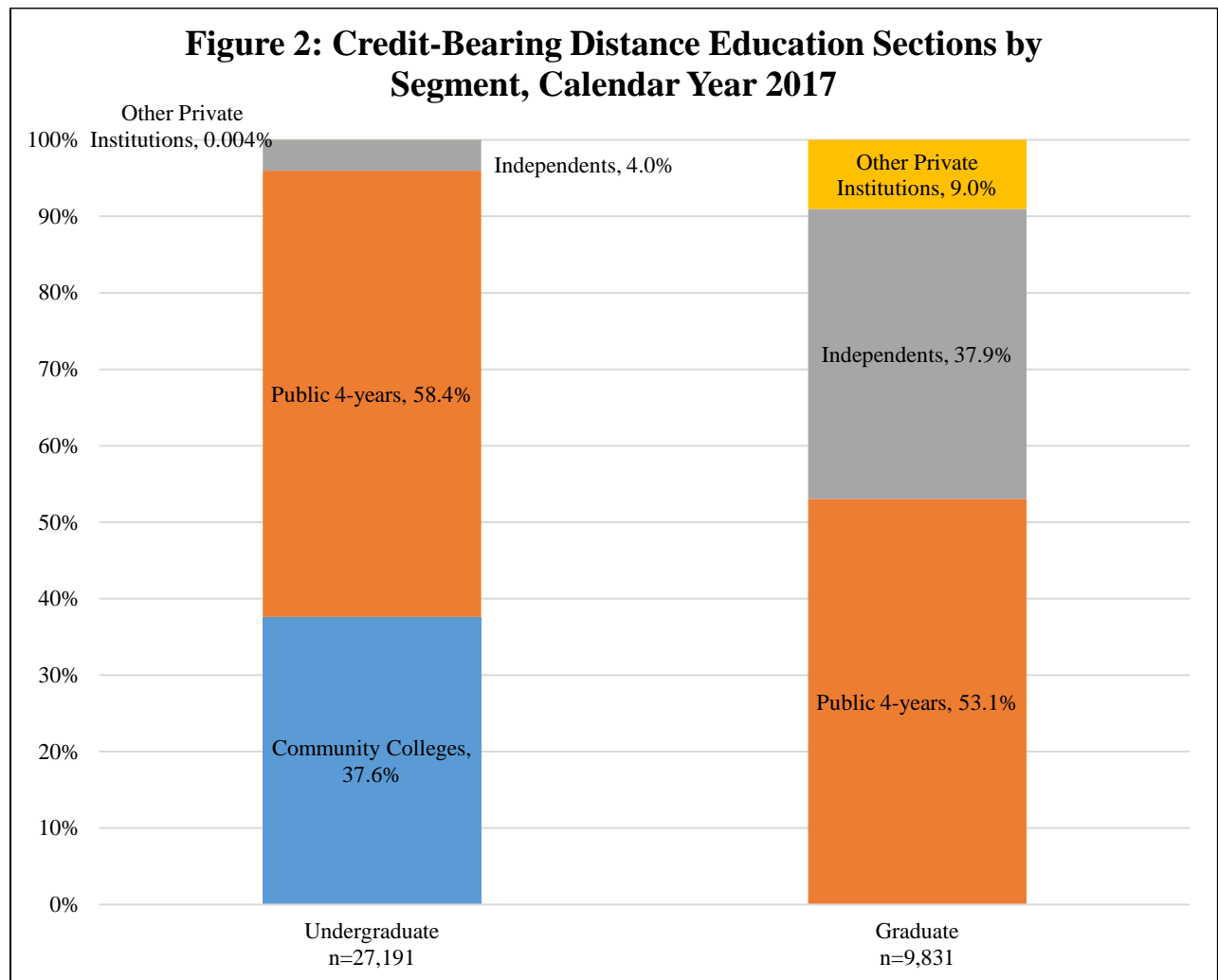


Table 1 shows the number of course sections taught, by term, of all courses offered via DE. These figures count courses in each term in which they were taught, rather than only one time throughout the year. As this shows, the majority of combined graduate and undergraduate DE courses are offered during the traditional spring (36.4%) and fall (37.8%) semesters. However, over one-fifth (21.9%) are taught during the summer semester. Given that the summer term enrolls a much smaller overall number of students than the other two terms, this suggests that students enrolling in the summer are more likely to enroll in DE courses than students taking courses during the traditional terms. Also notable is that while UMUC does not offer undergraduate courses during the winter, at the other public four-year institutions, this term constitutes over one-tenth (12.4%) of their total annual enrollment.

Table 1: Course Section Offerings by Term, Calendar Year 2017					
Undergraduate Courses					
	Winter	Spring	Summer	Fall	Annual
Community Colleges	444	3,960	1,887	3,937	10,228
All 4-Year Publics	545	5,784	3,556	5,985	15,870
<i>UMUC</i>	0	4,488	2,394	4,599	11,481
<i>4-Yr. Publics Minus UMUC</i>	545	1,296	1,162	1,386	4,389
State-aided Independents	24	398	278	392	1,092
Other Privates	0	0	1	0	1
Undergraduate Total	1,013	10,142	5,722	10,134	27,191
Graduate Courses					
	Winter	Spring	Summer	Fall	Annual
All 4-Year Publics	275	1,801	1,189	1,951	5,216
<i>UMUC</i>	145	862	625	863	2,495
<i>4-Yr. Publics Minus UMUC</i>	130	939	564	1,088	2,721
State-aided Independents	66	1,371	805	1,484	3,726
Other Privates	135	239	253	262	889
Graduate Total	476	3,411	2,247	3,697	9,831

Sections per DE course

The average number of DE course sections varies substantially by term, as Table 2 shows. This is particularly true at the undergraduate level, which ranges from 1.5 during the winter terms to 3.1 during the fall term. This is at least partially due to the lack of a winter term at UMUC, as they have by far the largest average number of sections per course at the undergraduate level. While there is fluctuation between terms at the graduate level, it is much lower than that at the undergraduate level, particularly for the non-winter terms.

Table 2: DE Sections per Course, by Term, Calendar Year 2017					
Undergraduate Courses					
	Winter	Spring	Summer	Fall	Annual
Community Colleges	1.4	1.7	1.5	1.8	1.7
All 4-Year Publics	1.2	4.5	2.6	4.5	3.6
<i>UMUC</i>	-	8.2	5.0	8.4	7.3
<i>4-Yr. Publics Minus UMUC</i>	1.8	1.8	1.3	1.8	1.6
State-aided Independents	1.3	1.5	1.2	1.4	1.4
Other Privates	-	-	1.0	-	1.0
Undergraduate Total	1.5	3.0	2.2	3.1	2.4
Graduate Courses					
	Winter	Spring	Summer	Fall	Annual
All 4-Year Publics	2.6	2.1	1.9	2.0	2.0
<i>UMUC</i>	7.6	3.2	2.4	3.1	3.0
<i>4-Yr. Publics Minus UMUC</i>	1.5	1.6	1.5	1.6	1.5
State-aided Independents	1.3	1.4	1.3	1.5	1.4
Other Privates	4.8	2.4	2.7	2.5	2.7
Graduate Total	2.6	1.9	1.7	1.8	1.8

Enrollment

Undergraduate

As Table 3 shows, types of undergraduate enrollment vary widely by segment. Students in state-aided independent institutions were far more likely than students in other segments to enroll only in traditional coursework, with over four-fifths (81.8%) enrolling in no DE courses during the calendar year. The vast majority (92.9%) of students at UMUC enrolled in either only DE courses or a combination of traditional and distance. However, students at the other public four-year institutions rarely enrolled solely in distance education courses, with only 2.3% of students enrolled entirely online. Excepting UMUC, community college students were the most likely to enroll in at least one DE course, with 12.1% of students enrolling in solely distance education courses and 25.5% enrolling in both traditional and DE courses.

Table 3: Unduplicated Undergraduate Enrollment by Type, Calendar Year 2017				
	Total Annual Enrollment	Traditional Only	Distance Only	Traditional and Distance
Community Colleges	224,435	62.5%	12.1%	25.5%
Public 4-Year	161,565	42.8%	33.4%	23.8%
<i>UMUC</i>	<i>126,488</i>	<i>7.1%</i>	<i>86.3%</i>	<i>6.6%</i>
<i>4-Yr. Publics Minus UMUC</i>	<i>35,077</i>	<i>63.8%</i>	<i>2.3%</i>	<i>33.9%</i>
Independents	3,555	81.8%	5.9%	12.3%
Other Privates	551,120	99.9%	0.0%	0.1%
Note: Enrollments are unduplicated annual enrollments within an institution. Students may be enrolled at more than one institution.				

Graduate

At the graduate student level, far more students enroll in at least one DE course. However, there is still significant variation across segments, as Table 4 illustrates. While undergraduate students at independent institutions were most likely to enroll solely in traditional courses, with fewer than one-fifth of students enrolling in a course of study that included at least one DE course, over half of graduate students (50.8%) took at least one DE course during the 2017 calendar year. At public institutions, while the percentage of graduate students enrolled in traditional-only coursework was approximately the same as undergraduate students (43.6% versus 42.8%), graduate students were far more likely to be enrolled only in DE courses.

Table 4: Unduplicated Graduate Enrollment by Type, Calendar Year 2017				
	Total Annual Enrollment	Traditional Only	Distance Only	Traditional and Distance
Public 4-year	57,379	43.6%	45.1%	11.4%
<i>UMUC</i>	20,234	0.2%	99.8%	0.0%
<i>4-Yr. Publics Minus UMUC</i>	37,145	67.2%	15.3%	17.6%
Independents	39,165	49.2%	27.2%	23.6%
Other Privates	2,215	10.9%	53.5%	35.6%
Note: Enrollments are unduplicated annual enrollments within an institution. Students may be enrolled at more than one institution.				

Duplicated Enrollments

When examining duplicated enrollments – where a student is counted for each course and each semester in which they enroll – it is clear that DE is making substantial contributions to Maryland’s institutions. Across all segments and levels, there were 676,065 enrollments in DE courses in 2017, as Table 5 shows. Due to UMUC’s DE focus, enrollments were particularly high at the public 4-year institutions, which educated nearly two-thirds (66.3%) of all undergraduate and nearly three-fifths (57.6%) of all graduate DE students at all institutions. However, DE enrollment at other 4-year publics was relatively low; UMUC alone enrolled nearly half (48.6%) of undergraduate students and a third (33.5%) of graduate students. Independent institutions constituted a fairly small proportion of DE enrollments (2.5%) at the undergraduate level, but at the graduate level, enrollments at independents constituted over one-third (37.4%) of DE enrollments statewide.

Table 5: Duplicated Calendar Year Enrollments, Calendar Year 2017			
	Undergraduate	Graduate	Total Enrollment
Community Colleges	167,854	0	167,854
Public 4-years	356,847	79,543	436,390
<i>UMUC</i>	<i>261,552</i>	<i>48,684</i>	<i>307,765</i>
<i>4-Yr. Publics Minus UMUC</i>	<i>95,295</i>	<i>30,859</i>	<i>124,797</i>
Independents	13,361	51,672	65,033
Other Private Institutions	3	6,785	6,788
All Institutions	538,065	138,000	676,065

Credit Hours

The majority (70.6%) of the over seven million credit hours earned by undergraduates at Maryland institutions continue to be earned through on-campus enrollment. However, more than one-fifth (22.3%) of credits are earned through online instruction. UMUC is clearly an outlier given that nearly all of its students (94.3%) earn their credits via online instruction. However, even when UMUC is excluded, it is clear that DE still plays an important role in educating undergraduate students from many Maryland institutions. Even excluding UMUC, over ten percent (13.1%) of undergraduate credits are earned via online delivery.

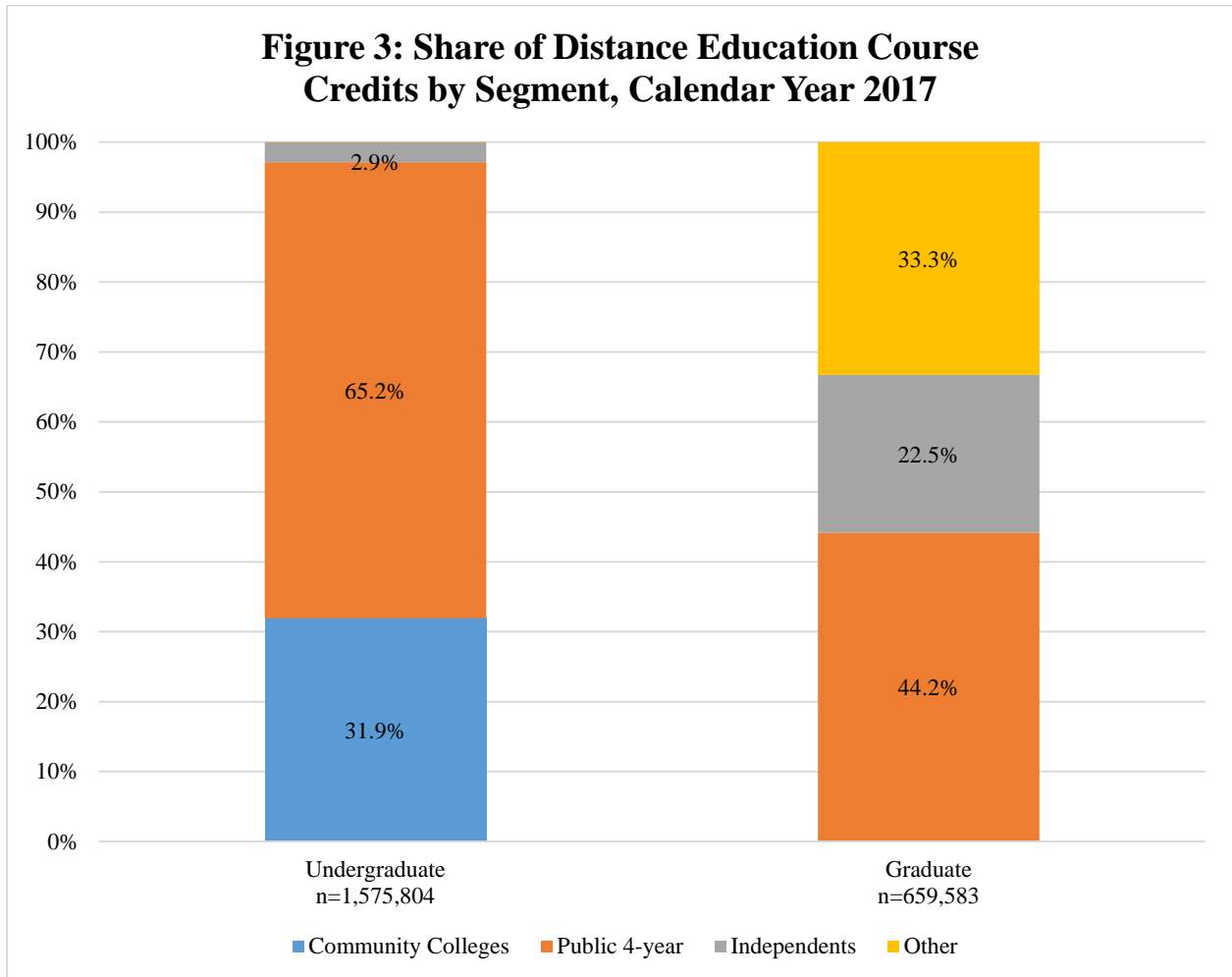
Table 6: Undergraduate Credit Hours by Delivery Method, Calendar Year 2017

	Total Credit Hours	On- Campus	Off- Campus	Online	Site- to- Site	Corres- pondence
Community Colleges	2,646,815	1,776,848	366,646	499,471	3,789	61
Public 4-years	3,480,881	2,355,076	98,278	1,020,929	6,599	0
<i>UMUC</i>	<i>793,333</i>	<i>0</i>	<i>44,921</i>	<i>748,412</i>	<i>0</i>	<i>0</i>
<i>4-Yr. Publics Minus UMUC</i>	<i>2,687,548</i>	<i>2,355,076</i>	<i>53,357</i>	<i>272,517</i>	<i>6,599</i>	<i>0</i>
Independents	810,872	743,773	21,652	45,007	0	441
Other Private Institutions	88,053	87,705	339	9	0	0
All Institutions	7,026,621	4,963,401	486,915	1,565,416	10,388	502

At the graduate level, online instruction makes a significant contribution to student credit attainment, as Table 7 shows. While on-campus instruction remains the predominant mode of instruction, comprising over half (51.0%) of credit hours earned, credits from online courses constituted over two-fifths (43.3%) of graduate credit hours. Notably, the importance of online coursework to graduate education was reflected across all segments. While again UMUC is an outlier – 99.9% of credit hours were earned through online education – in each segment, a sizeable percentage of credits came from online instruction. When UMUC is excluded, online courses still account for 24.4% of graduate credit hours. At the other private (non-State-aided) institutions, online coursework accounted for over half (54.9%) of graduate credit hours earned, while at State-aided independent institutions, nearly one-third (30.4%) of credits earned were from online courses.

Table 7: Graduate Credit Hours by Delivery Method, Calendar Year 2017						
	Total Credit Hours	On- Campus	Off- Campus	Online	Site- to- Site	Corres- pondence
Public 4-years	626,801	293,338	42,177	287,189	4,096	0
<i>UMUC</i>	<i>205,005</i>	<i>0</i>	<i>288</i>	<i>204,717</i>	<i>0</i>	<i>0</i>
<i>4-Yr. Publics Minus UMUC</i>	<i>421,796</i>	<i>293,338</i>	<i>41,889</i>	<i>82,472</i>	<i>4,096</i>	<i>0</i>
Independents	486,833	299,795	38,412	147,951	675	0
Other Private Institutions	399,694	179,062	764	219,622	50	196
All Institutions	1,513,327	772,195	81,353	654,762	4,821	196

As Figure 3 shows, the share of distance education course credits earned by segment varies substantially between the undergraduate and graduate student levels. At the undergraduate level nearly all (97.1%) of distance education course credits are earned at public institutions. However, at the graduate level, the distribution of credits earned is more evenly distributed across the three segments. The four-year public institutions still account for a plurality (44.2%) of graduate DE credits, but the other private institutions account for one-third (33.3%). Despite the small share of DE credits earned at the undergraduate level, nearly one-quarter of DE credits at the graduate level come from independent institutions.

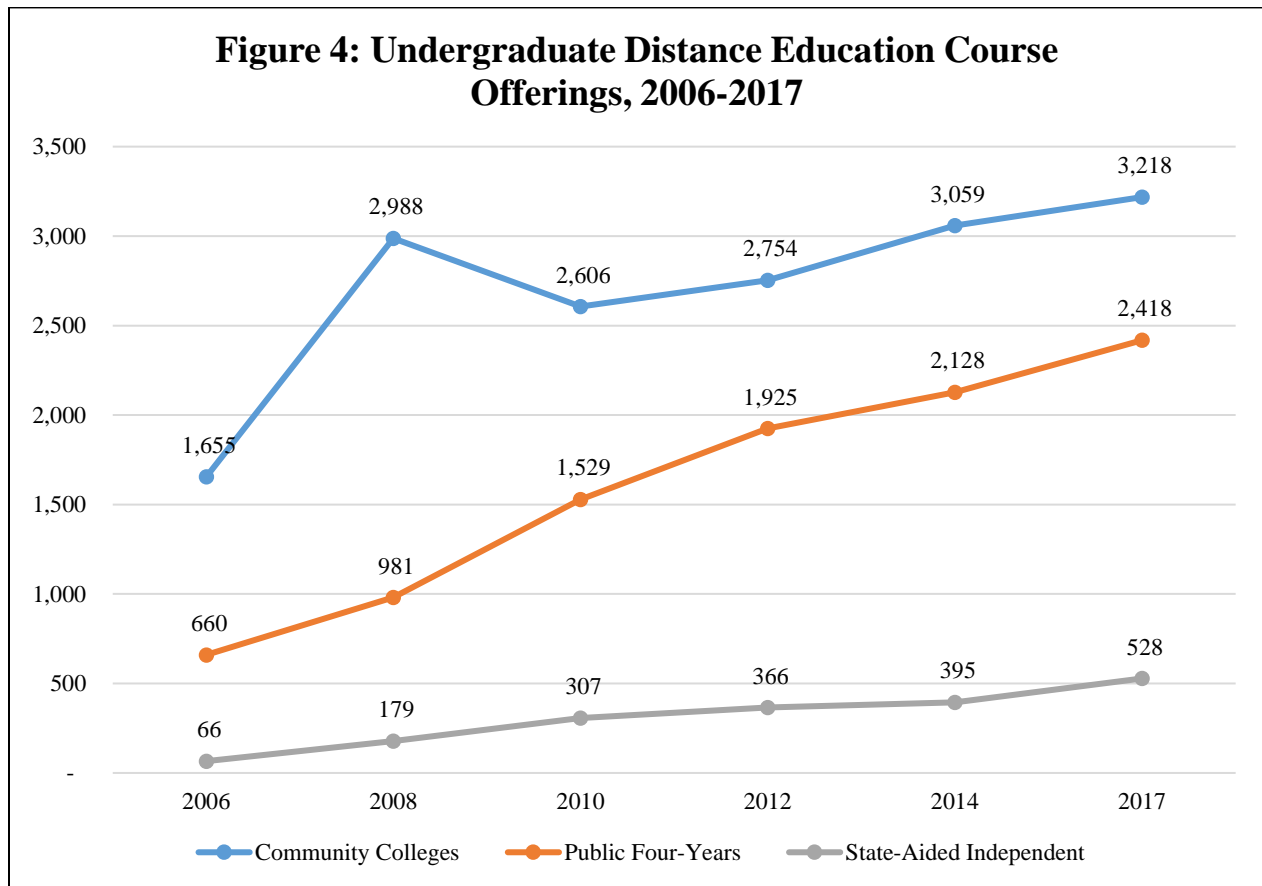


TRENDS IN DISTANCE EDUCATION

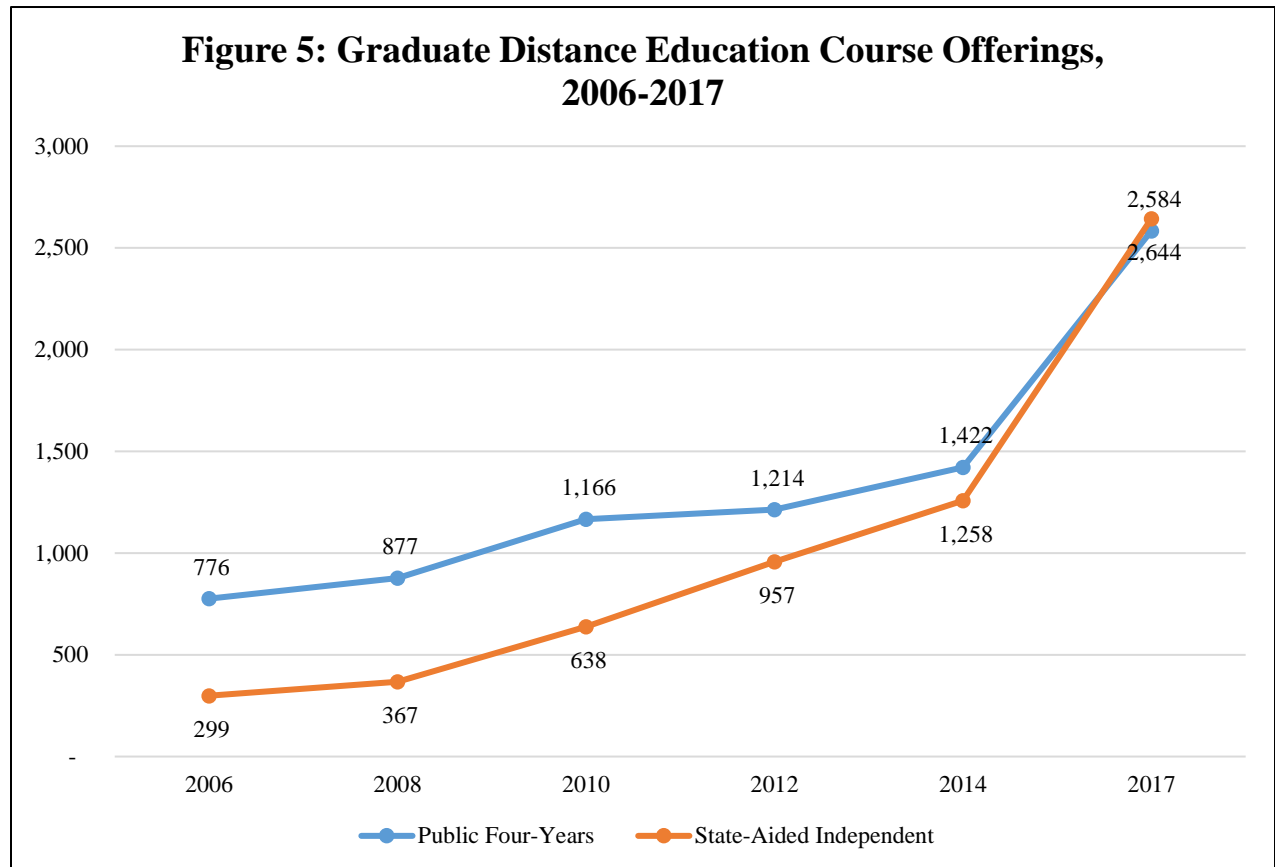
Course Offerings

The past ten years have seen substantial growth in the utilization and importance of distance learning. While geographic limitations may still play some role in limiting access to higher education, the majority of Maryland's students enjoy far greater choice than years ago. Since 2006, the number of courses available for enrollment through distance education has expanded tremendously, as Figures 4 and 5 show.

Students at four-year public institutions now are able to select from 2,418 unique undergraduate courses, an increase of 266.4% over the 660 courses offered in 2006 (Figure 4). The number of courses available at community colleges has nearly doubled since 2006, increasing from 1,655 in 2006 to 3,218 in 2017 (a 94.4% increase). The number of undergraduate courses offered via DE has also risen substantially (700.0%) at state-aided independent institutions; while this is largely a function of the low baseline for these institutions, nevertheless it is indicative of substantial growth of the usage of DE in this segment.

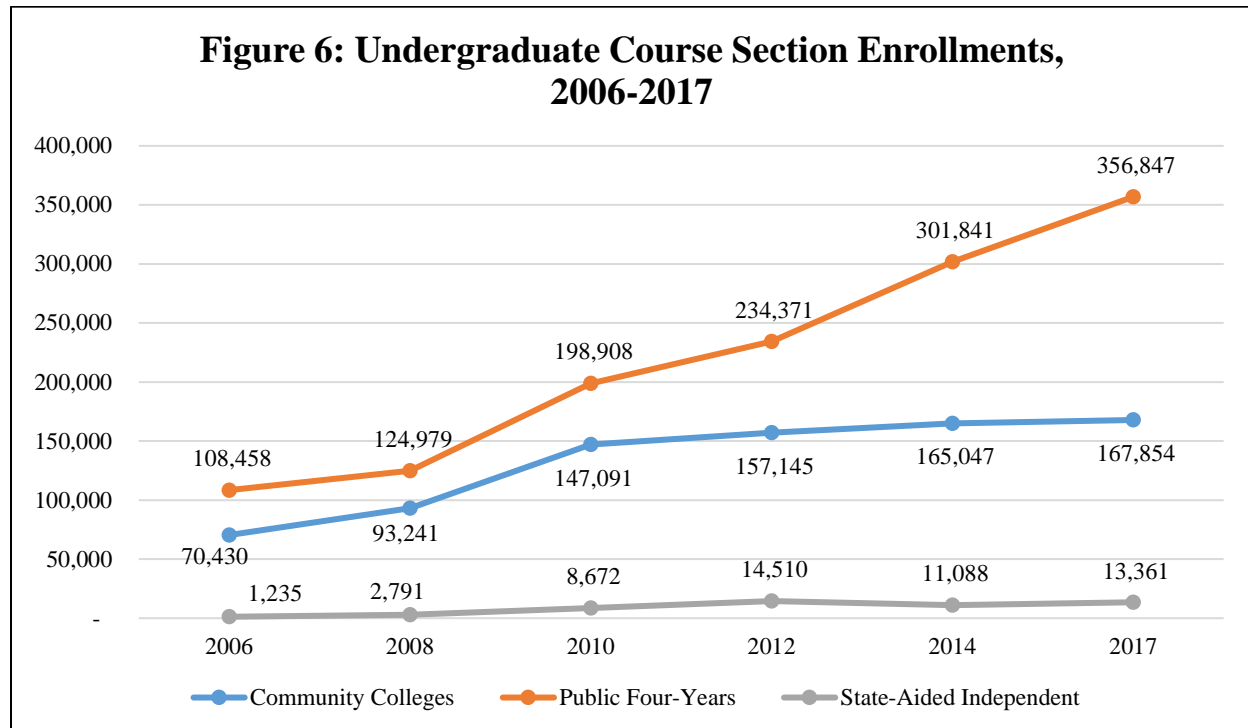


As Figure 5 shows, there has been even more growth in the use of distance education in graduate education, largely driven by the increase at state-aided independent institutions. While in 2006 nearly three-quarters (72.2%) of graduate DE course offerings were located at the four-year public colleges and universities, in 2017 just over half (50.6%) were offered by independent institutions. A significant driver of this has been increases in DE at Johns Hopkins University. While graduate education at both the public and independent sectors grew significantly between 2014 and 2017, by 2017, 55.8% of graduate credit courses offered at independent institutions were offered at Hopkins.



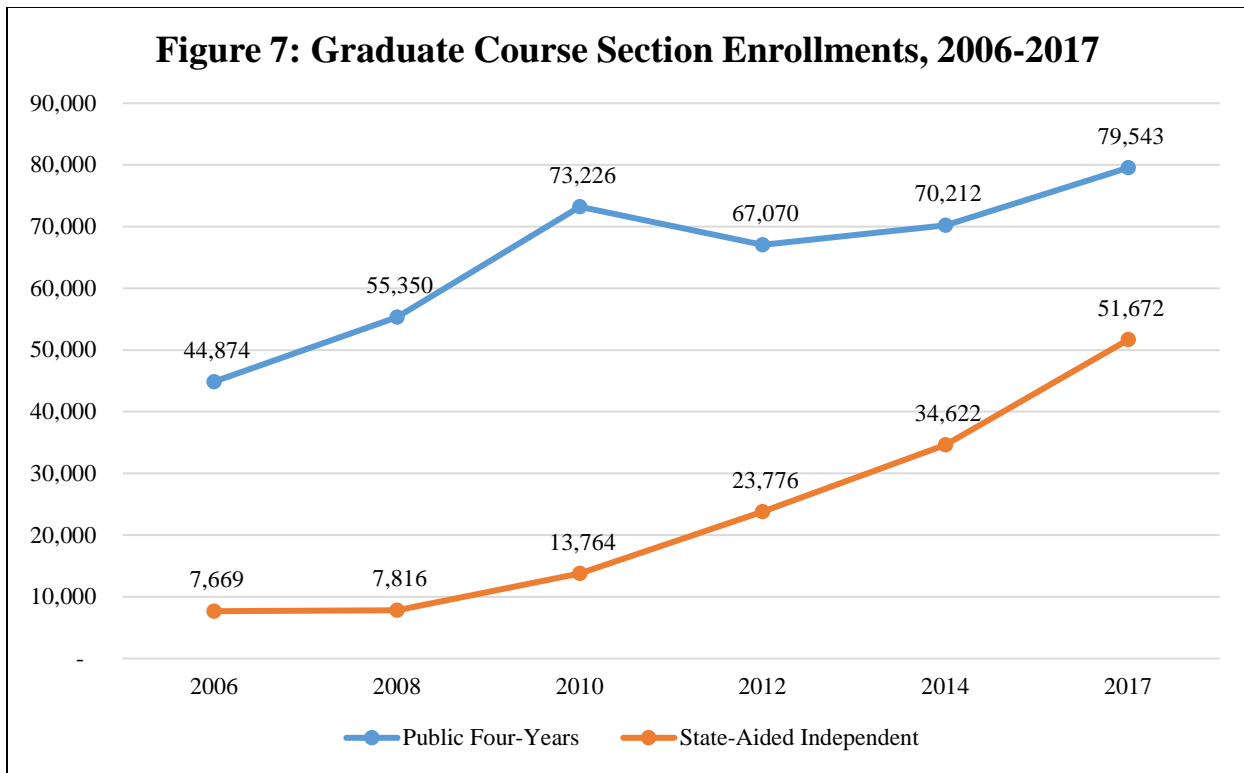
Enrollment

As the number of offerings available to students has increased, so has course enrollment. As Figure 6 portrays, at the undergraduate level, enrollments increased across all types of institutions, most substantially (248,389) at public four-year colleges and universities. DE undergraduate enrollments increased by the largest proportion at state-aided independents (981.9%) in the last decade. Most of that growth occurred by 2012, and both independents and community colleges have seen slower growth in the last few years. Therefore, it is appropriate to be cautious about the potential for further rapid growth in undergraduate distance education.



The percentage of undergraduate students enrolling in distance education has also risen substantially during that time. In 2006, approximately one-quarter (24.8%) of undergraduate students enrolled in at least one distance education course. By 2017, over two-fifths (42.6%) of students completed a course of study that was delivered either solely through distance education courses or through a combination of mixed and traditional courses. While this growth was uneven, it occurred across all segments. However, unlike course section enrollments, the greatest growth (29.4%) occurred at public four-year institutions. Substantial growth was also seen at community colleges (21.2%) and private institutions (14.7%).

While enrollments at the graduate level have grown more slowly, graduate-level DE enrollments continue to grow, as Figure 7 shows. As at the undergraduate level, the most significant changes in enrollment occurred among the state-aided independents, where enrollment more than tripled. Even with a 351.5% increase in enrollments, however, enrollments increased less rapidly than course section numbers. It is also notable that while the number of course sections at independent institutions currently exceeds those at public institutions after several years of rapid increase, the number of enrollments in DE courses lags well behind that of public four-years.



As with undergraduate enrollment patterns, a significant increase (24.1 percentage points) occurred in the percentage of graduate students enrolling in online courses. Nearly half of this growth took place at private institutions, where 52.8% of students now enroll in at least one distance education course; compared to 11.1% in 2006. However, there was also substantial growth in students enrolling in distance education courses at public four-year institutions. In 2006, nearly one-third (29.4%) enrolled in at least one distance education course throughout the year; by 2017, over one-half (56.4%) enrolled in distance education coursework at some point during the academic year.

DISTANCE EDUCATION PROGRAMS

Maryland institutions offer a wide variety of certificate and degree programs that can be completed entirely through DE, as Tables 8 and 9 show. While many of these programs are available through University of Maryland, University College (offering 127 programs) and Johns Hopkins University (97 programs), nearly all institutions have at least one program that allows students to earn a degree or certificate via distance education. While not all of these programs are available exclusively through distance education – some may be available via on-campus or other methods of instruction – these programs provide an important avenue for completion. Additionally, these programs run the gamut of disciplines, ranging from the liberal arts to the hard sciences, fully enhancing the ability of students to enroll in distance education.

Table 8: Distance Education Certificate Programs, Calendar Year 2017				
	Lower-Division Certificate	Post-Baccalaureate Certificate	Post-Master's Certificate	All Certificates
Community Colleges	61	0	0	61
Public Four-Year Institutions	89	19	2	110
State-Aided Independents	12	43	19	74
Other Private Institutions	4	3	1	8
All Institutions	166	65	22	253

Table 9: Distance Education Degree Programs, Calendar Year 2017					
	Associate	Bachelor's	Master's	Doctorate	All Degrees
Community Colleges	72	0	0	0	72
Public Four-Year Institutions	0	38	58	4	100
State-Aided Independents	0	9	87	3	99
Other Private Institutions	0	0	4	0	4
All Institutions	72	47	149	7	275

Since 2013, the number of degree and certificate programs available via distance education has followed this general trend of growth. Driven by a substantial expansion of post-baccalaureate and post-Master's certificate programs, certificate offerings have increased by over one-third

(33.9%) during that time period, from 189 in 2013 to 253 in 2017. While still increasing, the number of degree programs offered by Maryland's colleges and universities has seen much smaller growth (10.4%) in the past five years due to a significant increase (52.0%) in the number of Master's degree programs. Unlike the general growth seen in every other aspect of distance education, however, the number of both associate and Bachelor's degree programs has decreased (11.1% and 28.8%, respectively). This indicates that many institutions are in large part shifting their focus in distance education program development from undergraduate to graduate.

STATE AUTHORIZATION RECIPROCITY AGREEMENT

Another important factor affecting distance education is Maryland's participation in the State Authorization Reciprocity Agreement (SARA). In January 2016, Maryland joined 36 other states in becoming a member state of SARA. Under this agreement, states agree to recognize the authorization authority of other member states and impose no additional regulatory requirements on institutions within those states in the delivery of distance education to their students; thus, distance education programs approved by the State of Maryland can be freely offered to students of other member states, and Maryland residents can enroll in programs offered by participating institutions in other member states without requiring additional approval from the Maryland Higher Education Commission. This agreement includes all postsecondary institutions approved by the respective states, including public institutions and both non-profit and for-profit private institutions. Since Maryland joined in 2016, other states have continued to pursue membership; currently, 49 states, Washington, D.C., the U.S. Virgin Islands, and Puerto Rico are members.² During the 2017-2018 academic year, over one million students residing in SARA member states enrolled in distance education programs in other states at 1,791 institutions.

The number of Maryland institutions who are SARA members also continues to grow. During the 2015-2016 academic year, only seven Maryland institutions were members; during the 2017-2018 academic year, that number had grown to 25. The number of students accessing DE coursework also expanded significantly during that time period. However, this increase appears to have been largely driven by the fact that 2016-2017 was the first full academic year in which institutions were eligible for membership.

SARA simplifies the regulatory processes for both institutions and states. This in turn makes it easier for institutions around the nation to offer distance education to students from every state. Since Maryland joined SARA, 86,858 Maryland residents have enrolled in programs in other states. An additional 27,754 students from other states have been served by Maryland institutions.

² Massachusetts and Puerto Rico joined SARA in June 2018 and are beginning to accept institutional applications.

SARA's impact on distance education is difficult to predict. While Maryland institutions are likely to gain additional students from other states, Maryland students are also likely to enroll in programs based in other states. It is not clear that Maryland will import more DE enrollments than it exports. Growth may depend on a general increase in DE rather than on the ability of Maryland institutions to attract students from other states. Future editions of this report will include enrollment data from SARA in order to monitor this trend.

ACADEMIC COMMON MARKET

Maryland is one of 15 states that participate in the Academic Common Market, through which students can enroll in higher education programs in other states while paying in-state tuition rates. However, these programs have to be certified as programs that are not otherwise offered at Maryland institutions. As additional distance education programs are developed at Maryland institutions, it might be expected that either an increase in out-of-state students enrolling in these programs would occur, or that the number of Maryland students utilizing the Academic Common Market would decline.

Neither of these scenarios appear to be the case. Since 2008 (the first year for which data are available), the number of Maryland residents receiving certification for Academic Common Market each year has remained relatively stable. In 2017, 558 Maryland students were certified to enroll in out-of-state programs deemed eligible for Academic Common Market utilization. On the other hand, only 34 students from other states were enrolled at Maryland institutions. This shows that while distance education at Maryland's colleges and universities has grown substantially, it does not appear to have had a substantial impact in either attracting students from other states to Maryland institutions or on the number of Maryland students utilizing the Academic Common Market to enroll at colleges and universities in other states.

IMPLICATIONS FOR POLICY AND PRACTICE

It is clear that, during the past decade, Maryland's public, independent, and private institutions have significantly expanded the number of distance learning experiences that they offer, and that student enrollment has grown as well. UMUC is the leader in this area, in accordance with its statutory purpose and mission. But the vast majority of institutions also offer a growing number of distance learning experiences to students, and more students are enrolled in such courses than ever before.

One of the great hopes for distance education is that it will expand access to higher education for adult learners, other non-traditional students, and those in underserved areas of the State. At this juncture, however, it is not clear that the increase in DE offerings and enrollments has achieved this effect. While the number of enrollments in these courses has increased, the overall number of students enrolled at Maryland institutions has not increased by an order of magnitude. It is

possible that the growth in DE enrollments reflects only an increase in the number of students who supplement their face-to-face coursework with a few online courses. This possibility calls into question the assumption that there is a vast untapped demand for distance learning – or perhaps it means that any untapped demand cannot be reached solely by offering more courses, and that other obstacles such as time, money, college readiness, and broadband penetration must also be addressed.

Distance education is an accepted part of the postsecondary landscape, but the most optimistic claims for its potential to expand access have not been realized. As Maryland institutions continue to offer new courses and reach new students, future editions of this report will continue to examine the overall effect of distance education on postsecondary education and its role in helping students to achieve and thrive.