Tracking Online Education in Canadian Universities and Colleges:

National Survey of Online and Digital Learning 2019 Ontario Report

Report Author:
Nicole Johnson
Research Director

Research Team:
Dr. Tony Bates
Dr. Tricia Donovan
Nicole Johnson
Dr. Jeff Seaman

Canadian Digital Learning Research Association
Association Canadienne de Recherche sur la Formation en Ligne

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne

ACKNOWLEDGEMENTS

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

Sponsored by:

In partnership with:

Table of Contents

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning

EXECUTIVE SUMMARY

The public report on the results of the *2019 Canadian National Survey of Online and Digital Learning*, which was conducted throughout the spring and summer of 2019, is available at https://onlinelearningsurveycanada.ca/.

The sub-report on Ontario includes the national results from across the country and focuses on the responses from Ontario's post-secondary institutions. Ontario-specific results are presented under each key area of focus for the survey and are contextualized by the National results.

> In 2019, the Ontario government introduced a set of performance metrics (Ontario Objectives and Key Metric Areas) to evaluate the outcomes of post-secondary education in the province. In this report, we have identified the areas of the survey that align with these metrics and have listed the metrics addressed in the results at the start of each section.

The 2019 questions are similar to those asked in previous surveys. Many responding institutions have shared that the questions asked in the National Survey have contributed to their improved tracking of participation in online and digital learning. The 2019 survey results for online offerings are representative of our entire roster of institutions and provide the most accurate count of institutions with online offerings to-date; however, many institutions still struggle to provide data specific to their online enrolment activities.

The 2019 survey received a 70% response rate from across the country, which represents 164 responses out of our roster of 234 public institutions. Responses were highly representative of institution type, province and size of the institution.

In Ontario, all 25 colleges in Ontario and 21 out of 23 universities completed the survey, resulting in a 96% response rate. The study's findings highlight a higher than national average growth in online course enrolments in Ontario's post-secondary institutions: 14%, while the national average was 10%. These results demonstrate a growing maturity in online delivery across the country and a notable increase in online enrolments in Ontario's post-secondary institutions.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 1

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

Key findings:

All institutions in Ontario offer online learning and the growth in online registrations in Ontario exceeds the national average. The majority of institutions in Ontario expect online enrolments to increase in the coming year.

Ontario has higher than average offerings of badges, micro-credentials, and stackable credits with nearly half of responding institutions offering badges and micro-credentials.

Institutions in Ontario reported higher than average use of most technologies for teaching and learning. All responding institutions reported using Learning Management Systems (LMS) technology and a significant majority also use video technologies, mobile technology, and social media.

Open Educational Resource use in Ontario is widespread with 80% of universities and 78% of colleges reporting the use of OER. Roughly one-half of responding institutions in Ontario reported that they either had or were exploring a formal policy for OER or open pedagogy.

Most institutions in Ontario reported that online learning is very or extremely important to their long-term plan and the open-ended comments revealed a desire to innovate online offerings to improve access, improve quality, and to deliver experiential learning opportunities for workforce skill development.

Training faculty for digital fluency is important for furthering online education in Ontario. The top identified barrier to the adoption of online education among institutions in Ontario was 'inadequate training for faculty'. Institutions recognize the need for professional development for faculty teaching online; however, most professional development opportunities are voluntary and not mandated.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 2

INTRODUCTION

The 2019 Canadian National Online and Digital Education Survey is operated by the Canadian Digital Learning Research Association (CDLRA)/Association canadienne de recherche sur la formation en ligne (ACRFL), a federally incorporated not-for-profit organization. CDLRA/ACRFL was established to engage in research and publish information regarding online and digital learning in the Canadian education system. Dr. Tricia Donovan serves as the Executive Director, and Dr. Tony Bates and Dr. Denis Mayer serve as Directors of the Board.

This report represents the third annual study on tracking online and digital learning among publicly-funded, post-secondary institutions in Canada. The survey universe consists of all Canadian publicly-funded, post-secondary institutions. In 2019, a total of 234 institutions comprised the roster and included CEGEPs, colleges (including polytechnic institutions), private but publicly subsidized colleges in Québec, and universities. The 2019 survey had a response rate of 70% (164 of 234 institutions) with the responding institutions representing 90% of all students taking for-credit courses and 95% of all online enrolments in Canada.

Before the launch of the 2019 survey, institutions received a preliminary survey, which guided the development of new topics for inclusion in the survey. Several potential questions regarding enrolments were dropped as a result of this preliminary survey, while new questions on alternative credentials and online course registrations by level and location of study were added to the survey for 2019.

The criteria for inclusion in this survey is that the institution is a publicly-funded post-secondary institution in a province or territory of Canada. This includes universities, colleges, polytechnics, CEGEPs and private subsidized colleges in Québec.

This Ontario sub-report was prepared to provide insight and specific reference to the results provided by Ontario's colleges and universities to the *2019 National Survey on Online and Digital Learning* of Canada's post-secondary institutions.

In this report, the Ontario-specific results are compared to the National results. In particular, the following topics are focal points:

- The scale of online learning in Ontario's public post-secondary intuitions (discussed in the sections on online enrolment data, expectations for online enrolment, and blended/hybrid courses).
- The emergence of alternative credentials (including micro-certification) at Ontario institutions (discussed in the section on alternative credentials).

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 3

- How institutions are using and promoting innovation in technology-enabled teaching and learning practices (discussed in the sections on technologies and future developments).

- The use of free and open resources (OER) by students and instructors in Ontario institutions (discussed in the section on Open Educational Resources).

- Strategies and plans for improving quality and driving innovation in online and technology-enabled learning (discussed in the sections on strategies and plans, perceptions of online learning, future developments, and institutional insights).

- Training educators for digital fluency (discussed in the section on barriers to online adoption and professional development for digital fluency).

LIMITATIONS TO THE REGIONAL REPORTS

Regional reports are designed to be a single-year comparison to the national data. The purpose of these reports is to provide information about the distribution of the results from the National Report and to gain a richer understanding of the diversity associated with the growth and development of digital learning within Canada.

In the National Report, year-to-year comparisons of results are provided, where appropriate. Our position is that these comparisons are made possible due to the high response rate recorded at the national level. Based on our experience, if a small number of institutions report notable changes from previous years in their responses, the impact on the national level results is minimal.

For the regional results, however, the number of responding institutions is naturally much lower and varies considerably from region to region. For this reason, we purposely limit regional year-to-year comparisons or region-to-region comparisons. At the regional level, differences in the number of responding institutions within the region or variability in reported data from only a few institutions can substantially impact the magnitude of change in the reported proportions.

Our intent is to provide special reports as the survey matures to highlight important changes over time at the regional level. As data collection and reporting at the institutional level improves, we anticipate increased accuracy which will better facilitate such analyses.

If you would like to further discuss the results from each year, the CDLRA/ACRFL invites you to contact us at tdonovan@onlinelearningsurveycanada.ca.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 4

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

ONLINE ENROLMENT DATA

In Ontario, all institutions offer online courses for credit and the growth of online course registrations is slightly higher than the national average.

Ontario Key Reporting Metrics:

Measure and report the scale of online learning in Ontario public post-secondary institutions

Online learning is the primary delivery modality of distance education and is pervasive in universities and colleges across Canada. The 2019 survey measured the proportion of institutions that offer online courses for credit.

At the national level, of the 234 publicly-funded institutions included in our roster, 177 institutions (76%) offer some form of online learning and 57 institutions (24%) do not. In Ontario, 100% of institutions offer online courses for credit.

Nationally, online course registrations grew by around 10% between 2016-17 to 2017-18. This result, based on online course registration data among institutions who reported in both survey years, is broad-based with gains seen in all regions of the country, among all sizes of institutions, and among all types of institutions.

Ontario institutions experienced slightly greater growth in online course registrations between 2016-17 to 2017-18 with a 14% increase between 2016-17 to 2017-18.

CHANGE IN ONLINE COURSE REGISTRATIONS
FROM 2016-17 TO 2017-18

Region	Change
Western region	14%
Western Canada	8%
Quebec	8%
Atlantic region	4%

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 5
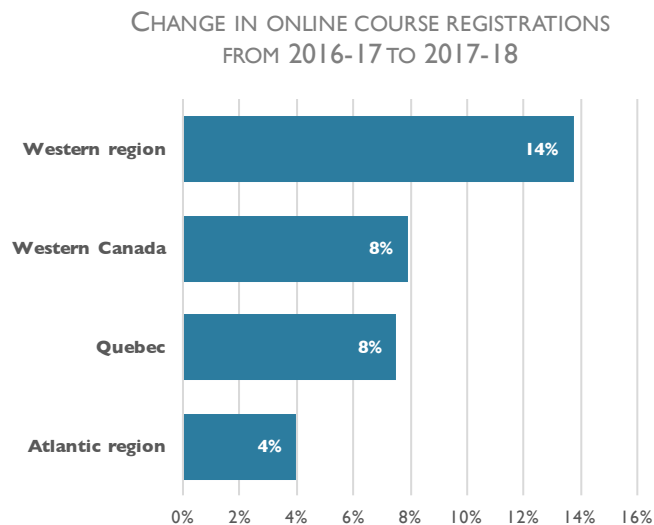
Within Ontario, colleges had a much higher growth rate in online course registrations (21%) when compared to universities, which had only a 7% year-to-year increase. This matches the national pattern of higher rates of online course registrations at colleges than at universities. The 21% increase among Ontario colleges is higher than the national average (14%) for colleges. The 7% increase in online course registrations among Ontario universities somewhat lags behind the national average of 9%.

These growth estimates use information from the 2018 and 2019 survey on 'total student course registrations in online courses'. There are several caveats to keep in mind when examining these results. The first is that collecting consistent student enrolment and registration data is far from easy, depending on institutional decisions on coverage by credit status, full- or part-time, which divisions of the institutions to include, etc. The assumption being made here is whatever processes the institution has chosen to apply, it remained consistent between the two years.

A further consideration is that the estimate does not reflect the totality of all Canadian higher education. At a national level, only 43% of institutions provided reliable data for both years; however, in Ontario, 83% (39 out of 47 institutions) were able to provide such data, making the data for Ontario considerably more reliable.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 6

**Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne**

ONLINE COURSE REGISTRATION BY LOCATION

The majority of online students attending Ontario institutions reside within the province; however, Ontario attracts slightly more online students from out-of-province than other regions.

> *Ontario Key Reporting Metrics:*
>
> Measure and report the scale of online learning in Ontario public post-secondary institutions

Institutions were asked to provide the proportion of their online students that resided within the same province as the institution, as well as the proportion of online students from outside of the province. Over one-third of institutions with online courses do not track this information and were unable to provide a response. A second group did not have exact data but were able to provide estimates, leaving only 39% of institutions with online offerings reporting that they tracked this data and were able to provide actual numbers.

In Ontario, 41% of institutions did not track the proportion of online students that resided in within the province.

At the national level, the majority of institutions (52%) reported that less than 5% of their online students resided outside the province and few institutions (18%) reported that 21% or more of their online students resided outside the province.

Ontario appears to attract slightly more online students from outside the province: a minority (44%) reported that less than 5% of online students were from outside the province and 22% of Ontario institutions reported that 21% or more of their online students resided outside the province.

ONTARIO: PROPORTION OF ONLINE STUDENTS FROM OUTSIDE OF PROVINCE

- 0 to 5%
- 6 to 10%
- 11 to 20%
- 21+%

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 7

**Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne**

EXPECTATIONS FOR ONLINE ENROLMENT

The majority of institutions in Ontario expect online enrolments to increase in the coming year.

Ontario Key Reporting Metrics:

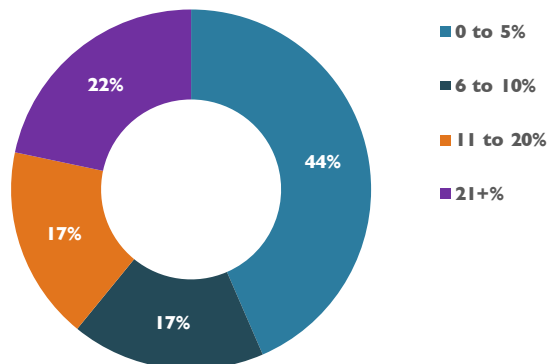Measure and report the scale of online learning in Ontario public post-secondary institutions

At the national level, the majority of institutions (71%) expected online enrolments to increase and only 7 institutions expected a decrease. A further 17% of institutions expected online enrolments to stay the same. In Ontario, a slightly higher proportion of institutions expected online enrolments to increase (74%) or stay the same (22%).

ONTARIO: EXPECTED CHANGE IN ONLINE ENROLMENTS FOR
NEXT YEAR

- Increase
- The same
- Decrease
- Don't Know

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 8

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne
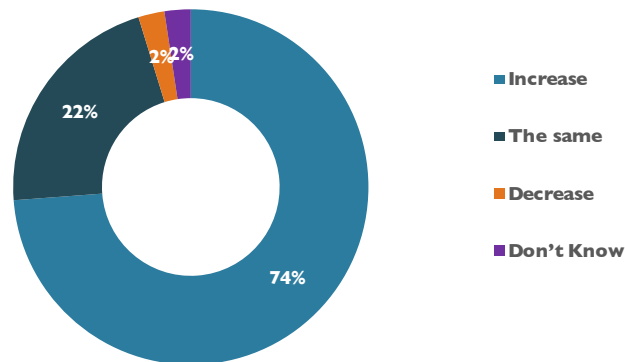
Institutions were also asked to predict change in total for-credit enrolments (the sum of their online and in-person courses) for the next year and, across Canada, fewer institutions (63%) predicted growth in their total enrolments compared to their online growth expectations. When considering overall for-credit enrolments, the proportion of institutions (63%) within Ontario that predicted growth in their total enrolments matched the national results.

ONTARIO: EXPECTED CHANGE IN TOTAL ENROLMENTS FOR NEXT YEAR

- Increase
- The same
- Decrease
- Don't Know

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 9
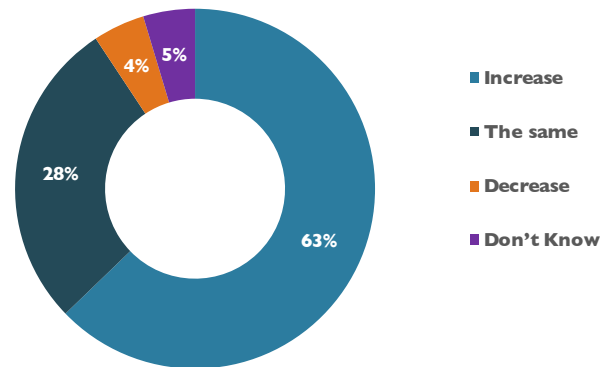
BLENDED/HYBRID COURSES

Blended/hybrid offerings are widespread within Ontario institutions.

> *Ontario Key Reporting Metrics:*
>
> Measure and report the scale of online learning in Ontario public post-secondary institutions

A greater proportion of Ontario institutions (86%) reported offering blended/hybrid courses when compared to the rest of the country (76%).

Nationwide, 40% of institutions reported an increase in blended/hybrid enrolments and 35% reported they had the same number of blended/hybrid enrolments compared to the previous year.

ONTARIO: BLENDED OR HYBRID COURSE OFFERINGS

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 10
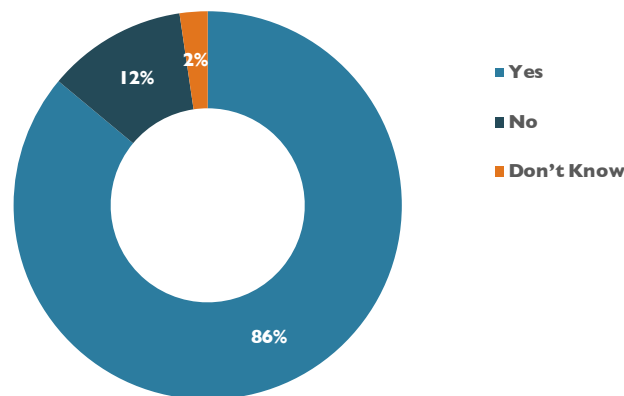
Although fewer institutions in Ontario (34%) reported an increase in blended/hybrid enrolments from the previous year, a greater number of institutions (49%) reported that blended/hybrid enrolments had stayed the same.

ONTARIO: CHANGE IN BLENDED ENROLMENTS FROM LAST YEAR
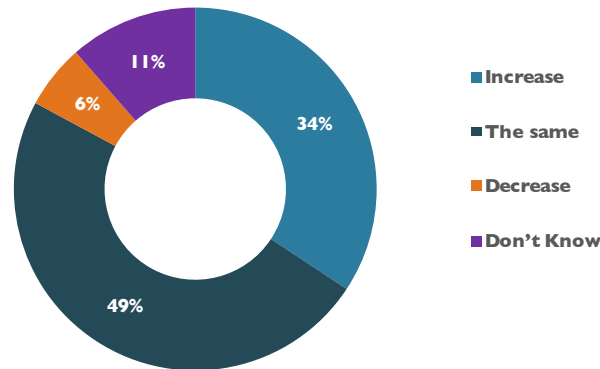
On a national level, when predicting change in blended/hybrid enrolments for next year, the majority of institutions (78%) expected an increase (49%) in blended/hybrid enrolments or expected their numbers to stay the same (29%).

The vast majority of Ontario institutions (87%) expect that blended/hybrid enrolments will either increase (46%) or stay the same (41%). No institutions within Ontario expect a decrease in blended/hybrid enrolments.

ONTARIO: EXPECTED CHANGE IN BLENDED ENROLMENTS FOR NEXT YEAR
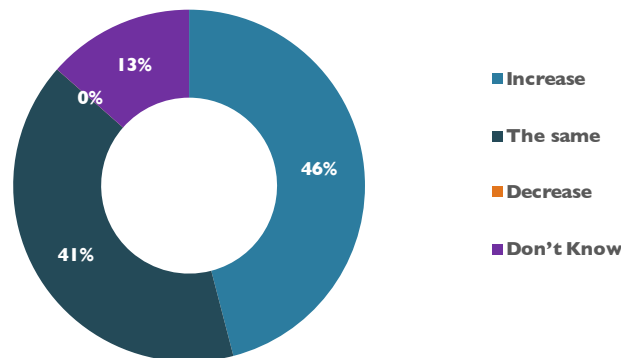
Of the Ontario institutions that provided open-ended comments about blended/hybrid learning, some described having a strategic plan for increasing and improving blended/hybrid offerings. Other institutions commented that blended/hybrid learning was happening but it was ad hoc and at the discretion of faculty.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 11

As part of a strategic initiative, our college has developed a number of hybrid and online courses. Phase 2 of this initiative will result in the development of additional hybrid and online courses. (Large college)

The number of blended/hybrid courses being offered at our university is steadily growing as professors receive more support for course development activities. The support is being provided by a growing number of Educational Support Professionals being employed on-campus. We are looking into expanding our online and blended course development and delivery to noncredit programs as well. (Large university)

Implemented a new "multimedia production" service to bolster the investment in digital content creation for hybrid/online courses. (Medium college)

We are integrating it into our unit's strategic plan. Currently, hybrid teaching is at the discretion of the course instructor and is not formally identified in the academic calendar or timetable. (Large university)

Although most at the institution are aware of offering courses using a hybrid modality, we have not seen accelerated growth in this area. Any growth that is happening in this area is done "on the side" or in the margins. (Large college)

Any current blended/hybrid learning is conducted at the course level at the discretion of the individual faculty member. Planning is underway to introduce formal hybrid offerings at the institutional level, likely to be launched in the 2020/21 academic year. (Medium college)

One large college described the variety of hybrid learning designs offered by their institution:

A variety of designs are used for hybrid offerings depending on the course, the program, etc. Courses may offer in-class every other week, with online activities occurring between in-class. A number of part-time offerings are reducing the number of hours required in class each week, and replacing those hours with online activities. An example is some early morning part-time courses where students attend in-class each week on their way to work from 7:30 till 9 am, and additional on-line activities take place asynchronously for approximately an hour and a half each week. Any combination is possible, including in-class meeting for an orientation to the course on the first day, online activities for the most part with in-person attendance for one class in the middle of the term, and perhaps a review day near the end before the monitored final exam. Virtually any combination that works best for the faculty and students is considered and acceptable.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 12

**Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne**

ALTERNATIVE CREDENTIALS

Ontario has higher than average offerings of badges, micro-credentials, and stackable credits.

Ontario Key Reporting Metrics:

Deploying a micro-certification platform across the higher education sector

Influencing and supporting the expanded use of micro-certification at Ontario's colleges and universities

New to the 2019 survey were questions on alternative credentials such as micro-credentials, stackable credits, badges, blockchain, and competencies (from competency-based learning). Essentially, alternative credentials are offerings beyond traditional degrees, diplomas, and certificates. As institutions continue to develop and implement alternative credentials, operational definitions are needed to support institutions in classifying and tracking such offerings.

Nationwide, of the institutions that responded to whether they offer alternative credentials, nearly one-half are experimenting with these offerings.

In Ontario, the most common alternative credentials reported by institutions were badges (48%), micro-credentials (44%), and stackable credits (37%).

ALTERNATIVE CREDENTIALS

Category	Ontario	National
Badges	48%	32%
Micro-credentials	44%	36%
Stackable credits	37%	22%
Other	30%	42%
Competencies	26%	28%
Blockchain	7%	3%

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 13
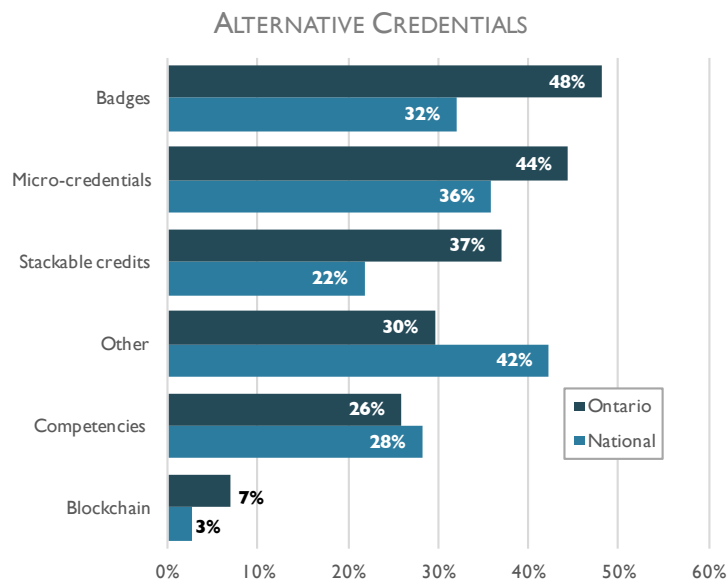
At the national level, there appeared to be some ambiguity as to what qualified as an alternative credential, with many institutions reporting that they offered an 'other' alternative credential. The open-ended comments from institutions across the country revealed that the selection of 'other' on the survey reflected a broader sense of uncertainty regarding how to categorize alternative offerings. In Ontario, 30% of responding institutions reported that they offered some 'other' alternative credentials.

A few Ontario institutions provided open-ended comments related to alternative credentials. Consistent with the national-level comments, Ontario institutions described the exploratory state of alternative credentials and the different credentials being offered.

> *We are actively engaged in a number of projects involving micro-credentials, stackables and badges, and competencies. Each of these has the potential of including OER components. (Large college)*
>
> *The above [alternative credits listed in the survey] are not yet offered but are being actively explored . . . Continuing Education, given its mandate to enable workplace learning, is very interested in competency-based learning, badges, stackable credentials, and micro-credentials. (Large university)*
>
> *MOOC Certificates of Completion (Large university)*
>
> *Some programs are piloting digital badging. (Large university)*

One large college mentioned that micro-credentials are part of their overall strategic plan:

> *As part of our eLearning strategy, our institution will focus heavily on the development of fully online programs for the next three years. We will build our portfolio to provide more flexible options for current and prospective students. In addition, we will build our micro-credential portfolio to meet student and employer needs.*

Overall, alternative credentials are being offered by a significant minority of institutions in Ontario. There appears to be institutional interest in the further development of alternative credentials.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 14

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

TECHNOLOGIES

Institutions in Ontario reported higher than average use of most technologies for teaching and learning.

Ontario Key Reporting Metrics:

Promoting innovations in technology-enabled teaching and learning practice

Improving quality and driving innovation in online and technology-enhanced learning

The survey provided a list of technologies and asked institutions to check any of these technologies that they utilize in teaching and learning. The results indicate that the responding institutions use a wide range of the listed technologies.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 15

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

Nationwide, Learning Management Systems (LMS) are the primary technology that is extensively used by institutions in their online courses. In Ontario, all institutions reported using LMS technology.

TECHNOLOGIES USED IN ONLINE COURSES
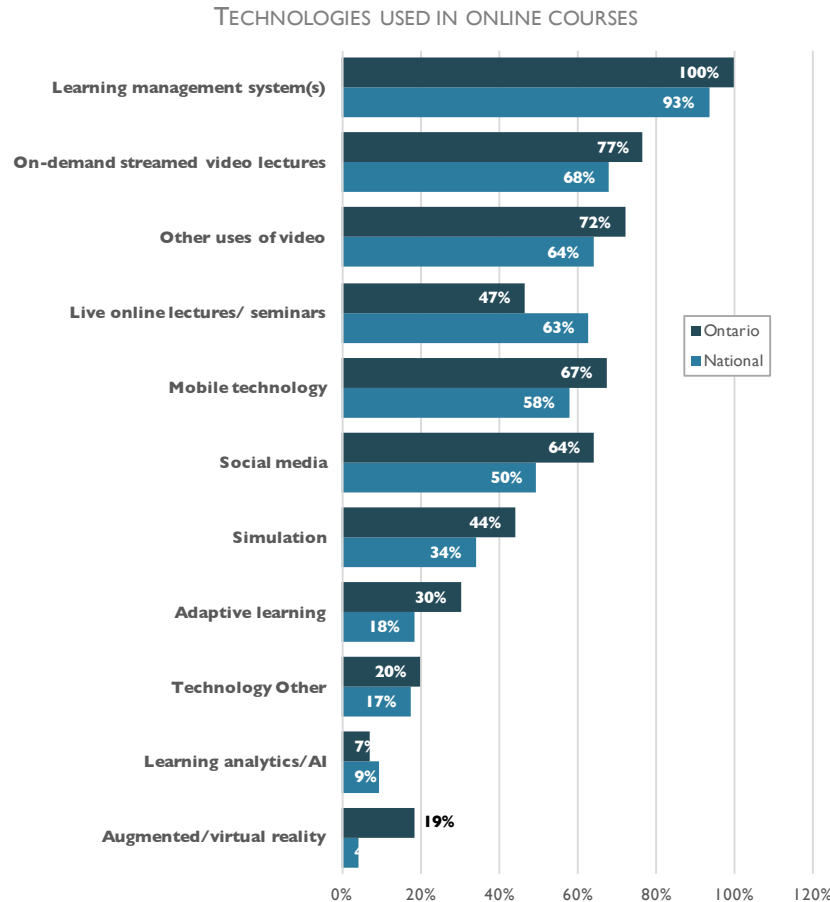
The Ontario results are also reflective of the national results concerning the use of video technology. Compared to the national results, a greater proportion of Ontario institutions reported using on-demand streamed video lectures (77%) and other uses of video (72%). Fewer institutions (47%) in Ontario reported offering live online lectures/seminars compared to 63% of institutions across the country using this technology.

Ontario institutions also reported greater use of mobile technology (67%), social media (64%), simulation (44%), and adaptive learning (30%) when compared to the country as a whole.

The open-ended responses from Ontario institutions related to technology illustrated how mainstream technologies are being used and how new technologies are being explored.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 16

Some institutions described the ways in which they are incorporating innovations in technology-enabled learning:

The use of the LMS in addition to social media, videos, polling sites and well-crafted HTML5 pages are commonplace when it comes to our online offerings. However, adding more complex elements such as VR and adaptive platforms has proven to be a bit more challenging. They are both challenging on the development side, but more specifically, challenging with regards to ensuring equitable student access (bandwidth, AODA requirements, added technologies that the user must own/have access to, etc.). (Large college)

We are actively exploring the use of AR/VR as well as developing simulations for our on-line courses. (Large college)

Social media is used informally by students in many courses as a collaborative tool. Other technologies include Anatomy TV, e-learning modules created with rapid development software like Articulate Storyline or H5P, voiceover PPT, Open Access Journal software, etc. VR is currently in development. (Small college)

Several of our programs are developing VR and simulation-based curriculum. (Small college)

Exploring the use of AI Tutor. (Large university)

We have been exploring the use of immersive VR in curriculum contexts, integration of experiential learning supports in module format, and also support for online proctoring. As part of our ongoing enhancement of our academic toolbox, we are reviewing advanced discussion tools, publisher integration for online textbooks, and peer assessment tools. (Large university)

In the near future, we'll be adding more robust access to analytics for instructors and students. We will be adding interactive elements for content delivery via H5P. There will be experimentation with AR/VR in some classes in the coming year. (Large university)

Comments from other institutions reflected an emphasis on improving the quality and practicality of technology-enabled learning experiences:

Our university makes effective use of technologies in online courses. We continue to explore various student engagement platforms and ways in which we can extend our current environment to enhance the student and instructor experience. This includes tools to support competency-based education, student success, and adaptive learning. (Large university)

Improved student collaboration tools (for student groups, or instructors with student groups); improved video assignments. (Large university)

Media management is a challenge we need to deal with as we don't currently have an institutionally supported and enterprise-level solution for this. We would also like to transition our ePortfolio system to an enterprise-level solution (hosted WordPress). (Large university)

There is an increased focus on electronic portfolios, and their application to practicum courses, and transferability to prior learning documentation. (Medium college)

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 17

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

In general, institutions in Ontario are actively using technology to support learning. The survey results indicated that many institutions continue to explore new technologies and strategies to enhance student learning.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 18

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

OPEN EDUCATIONAL RESOURCES

OER use in Ontario is widespread and higher than the national average.

Ontario Key Reporting Metrics:

Providing ongoing access and support for free and open resources for use by students and instructors in Ontario institutions

Open educational resources (OER) are resources useful for teaching and learning (text, media, and other assets) that are freely accessible and openly-licensed (such as a Creative Commons license), where there is legal permission for creation, use, and reuse of educational content.

At the national level, of the 143 institutions that responded to the question on open textbook use at their institutions, 54% reported that they currently use open textbooks. An additional 17% are exploring their use. In Ontario, a greater proportion of institutions reported using open textbooks (67%) with an additional 19% exploring their use.

ONTARIO: OPEN TEXTBOOK USE

- Yes
- Exploring
- No
- Don't know

7%
7%
19%
67%

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 19

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne
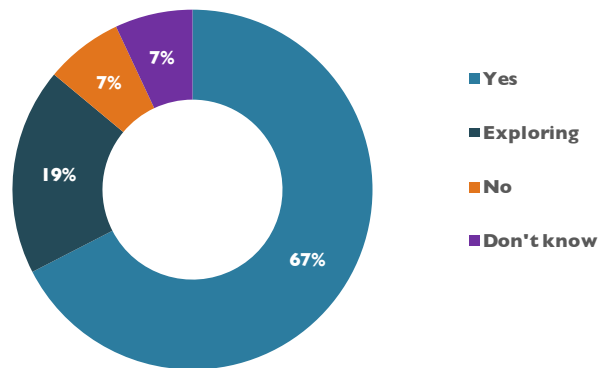
The 2019 survey also asked institutions whether they use OER other than open textbooks. Use of other OER in Ontario institutions (79%) exceeded the national average (67%).

ONTARIO: OER USE
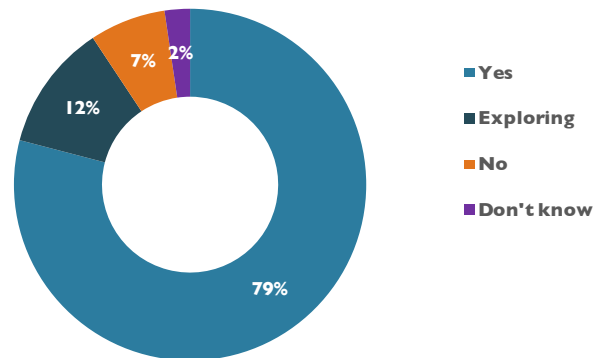
Both universities and colleges in Ontario reported widespread use of OER: 80% of universities and 78% of colleges reported using OER.

ONTARIO: OER USE BY INSTITUTION TYPE

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 20
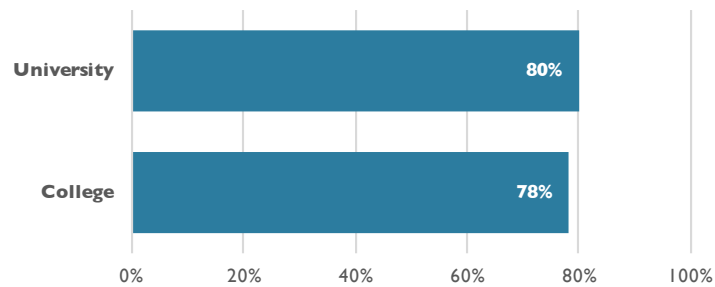
The national results indicated that most institutions are concerned to some degree that cost is a barrier in preventing students from having the required material. Ontario institutions share this sentiment.

ONTARIO: CONCERN ABOUT COST AS A BARRIER FOR COURSE MATERIALS

- Critical barrier
- Often a barrier
- A few instances
- Perhaps
- No
- Don't know
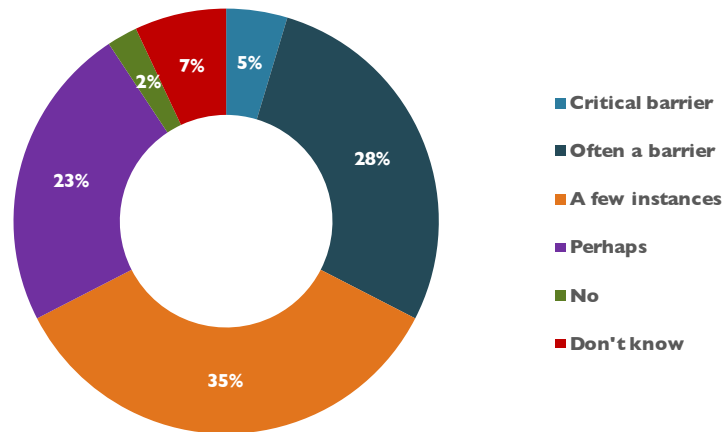
Despite the concern that the cost of course materials may be a barrier for students, few institutions (9%) across the country reported having a formal policy or strategy for OER and/or open pedagogy; however, 39% of Canadian institutions reported that they are exploring or developing one. A slightly greater proportion of Ontario institutions reported having a formal policy for OER and/or open pedagogy (11%) or are exploring such a strategy (42%).

ONTARIO: FORMAL POLICY OR STRATEGY FOR OER OR OPEN PEDAGOGY

- Yes
- Exploring
- No
- Don't know

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 21
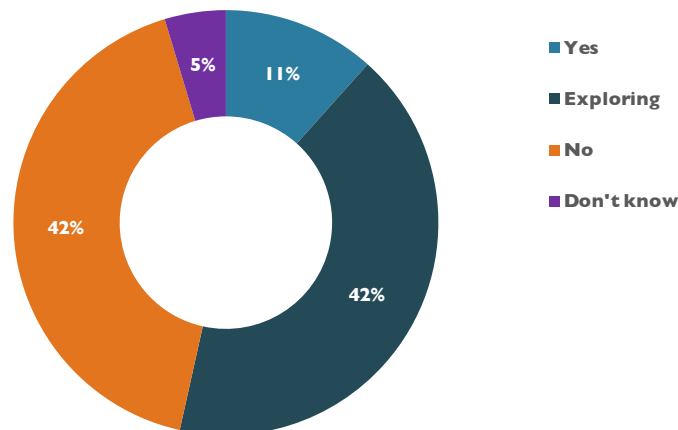
A shift in funding support in Ontario in 2019 removed incentives for direct development of OER from the central body; however, in the open-ended responses, some Ontario institutions shared that they had incentives, grants and strategies in place to encourage OER adoption.

We don't currently have a formal strategy for increasing the use of open resources, but do offer grants, pedagogical, and technical support for finding adopting, adapting, and creating open resources. (Large university)

Instructors interested in creating or adapting a resource are provided with consultation and guidance from our service areas to support content planning, license and copyright requirements, and online publishing processes. A grant program incentivizing adaptation of OER materials has recently been approved by the library for the coming fiscal year. (Large university)

A couple of our departments promote open textbook options, and OERs in general, through workshops and faculty consultations. The library includes an informational webpage that supports faculty seeking to learn more about OERs, and also makes several thousand open books and journals available through its homepage search tool. (Large college)

Recognizing the importance of OER's and open textbooks for our learners, our college is proactively promoting the use of these educational materials via our libraries. (Large college)
We are devising guiding principles for the adoption of resources that will encourage open education resources. This will be added to policy. (Large college)

Our university has established a task force that is committed to raising awareness of OER and other alternatives to commercial textbooks and course packs, as well as providing support for instructors interested in adopting, adapting or creating OER for their courses. (Large university)

Our college continues to work on getting the word out about OER via grassroots efforts. We work with individuals who express an interest in OER and use them as champions to show how OER can be used successfully. (Large college)

Yet, challenges to OER adoption by faculty persist. One large university shared that faculty at their institution gravitate toward publisher resources as opposed to OER.

At this time OERs appear to be an emergent interest to our instructors. While we have instructors who have created or adopted OERs, the vast majority of faculty choose to use publisher resources. Some of this is related to convenience and awareness but also to the richness of commercial resources. (Large university)

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 22

**Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne**

STRATEGIES AND PLANS

The vast majority of institutions in Ontario consider online learning to be an important part of their long-term plan.

Ontario Key Reporting Metrics:

Improving quality and driving innovation in online and technology-enabled learning

Developing a set of experiential learning opportunities for work-force skill building that are co-designed and scalable through a template library available to student and/or institutions

Improving learning in technical subject areas

Consistent with the national results, online learning is a highly important part of institutional long-term plans in Ontario: 33% of Ontario institutions reported that online learning is extremely important to their long-term plan and 51% reported that it was very important.

ONTARIO: IMPORTANCE OF ONLINE LEARNING FOR LONG-TERM PLAN

- ■ Extremely important
- ■ Very important
- ■ Moderately important
- ■ Slightly important
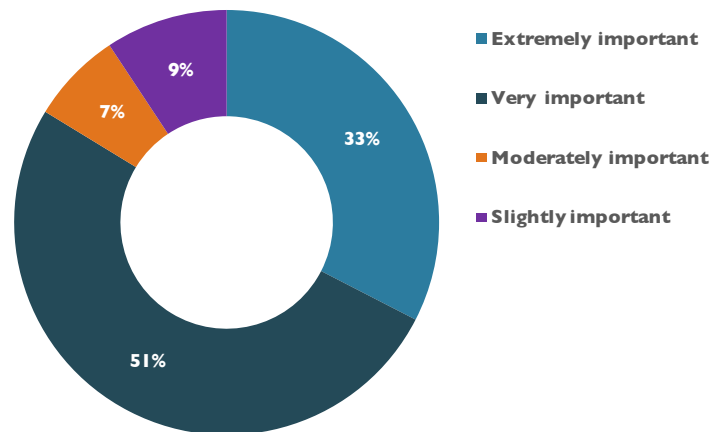
Across Canada, colleges were most likely to report that online learning was important for their long-term plan, with 84% colleges rating this as very or extremely important.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 23

In Ontario, 95% of colleges reported that online learning was very or extremely important for their strategic plan. Responses from Ontario universities were considerably lower, with 70% reporting that online learning was very or extremely important.

ONTARIO: IMPORTANCE OF ONLINE LEARNING FOR
LONG-TERM PLAN: INSTITUTION TYPE
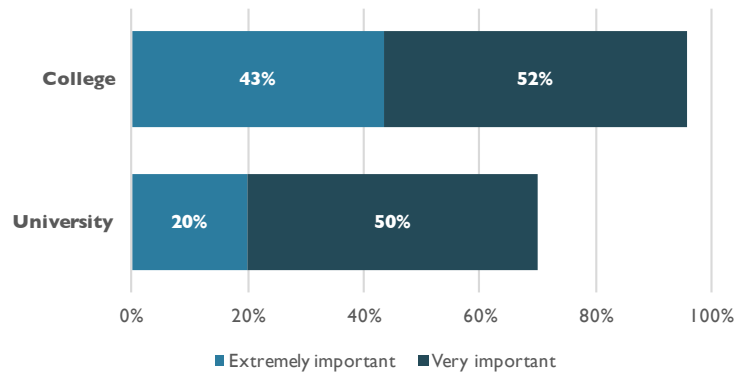
While across Canada, the proportion of institutions that are implementing a plan to some extent remain a minority (42%), a slight majority of institutions in Ontario (55%) reported that they have a plan for e-learning that is fully implemented or being implemented. An additional 31% of Ontario institutions are developing a plan and 14% did not have a plan yet but acknowledged a need for one.

ONTARIO: STATUS OF STRATEGIC PLAN FOR E-LEARNING

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 24
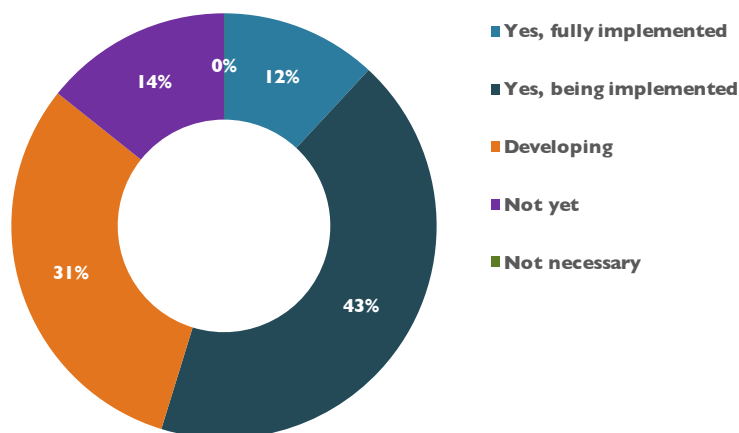
Institutions were invited to write an open-ended comment describing their strategies and plans for online learning. The comments illustrated some of the priorities driving the growth and development of online learning.

Some institutions stated the importance of using technology to improve access and inclusion:

Due to the declining population in our region, we have to incorporate more online and/or blended/hybrid delivery options to allow us to offer our programming to a broad geographic area. It also allows students to study in their home communities, which allows many students an opportunity for post-secondary education that might otherwise be inaccessible. (Medium college)

Online learning is not prevalent at our institution. However, in order to accommodate the complex lives of undergrads, the online courses are likely to be welcomed. Online may assist our institution in its efforts around supporting the learning needs of international students as well. (Large university)

Our institution has chosen to adopt a strategy focused on technology-enabled learning that uses technology to support student engagement, pedagogical innovation and inclusion rather than more resource-intensive online course development. (Medium university)

Other institutions discussed improving the quality of technology-enabled learning as part of their strategic plan:

We are currently working on processes for quality assurance. (Large college)

Online learning has been an important part of our institutional culture for some years. About 1/3 of every student participates in an online course. That being said, we feel that there are ways we can adjust, refine and refocus our online offerings to better support student success. We are about to embark on a planning activity that we feel will help reposition online learning at our institution. Integrating more blended learning offerings is also seen as a way to integrate more student-centered teaching approaches, and ultimately shifting the teaching culture here. (Large university)

Online learning at our institution uses a centralized approach to support the design and development of high-quality courses. This includes instructional design, technical, multimedia, quality assurance, etc. This model ensures that there is a consistent approach and quality standard in all online courses offered here. (Large university)

Several institutions mentioned strategic plans with a focus on flexible and experiential learning opportunities along with workforce skill development:

Online and blended fits with a larger strategy around flexible and authentic learning that dovetails into the experiential learning initiative. (Large university)

Online, blended, hybrid and distance learning will be critical to our commitment for flexible, personalized and relevant models for our shifting markets and learner expectations. We see different learning modalities as key to learner success. (Large college)

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 25

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

Our current strategic plan (2018-2023) is very much focused on increasing how and when we integrate technologies into the curriculum and classroom experiences. We understand that we must prepare students for changing work environments, which means offering students the curriculum using different modalities. With this in mind, student success and engagement and the adoption of universal design principles are at the forefront of all of our teaching and learning experiences, including our online and hybrid offerings. (Large college)

Our college privileges small-class, in-person, applied and experiential learning to support the cultivation of higher technical and vocational knowledge and skills. We incorporate online, blended and technology-enhanced learning strategically into our programs to ensure that our graduates are capable of learning effectively through the forms of mediated learning that they are likely to encounter through lifelong learning in their professions. (Large college)

Online learning has been considered very important after the university's academic plan was adopted. Online learning, also known as eLearning, is changing rapidly and student demand for technology-enhanced learning of all kinds is increasing, partly because of the flexibility it provides in terms of scheduling and partly because of changing demographics among learners (e.g. more professional, adult and post-degree learners). Online learning also relieves space, infrastructure and timetabling constraints on campus. More importantly, however, models for online, blended and technology-enhanced education are quickly adapting to include a high level of student engagement, the development of transferable academic skills, assessment of student learning; experiential and entrepreneurial eLearning. Our new strategic plan commits to supporting continuous learning, much of which will be accomplished via online programming. (Large university)

Developing new online courses and updating existing online courses aligns with one of our institution's key academic goals. We continuously strive to deliver high quality, flexible online courses, which are relevant to today's economy and workforce. (Large university)

The open-ended comments illustrated that institutions in Ontario recognize the complex learning needs of students. The descriptions of institutions' strategic plans for technology-enabled learning indicated that such plans are centered on providing more accessible, inclusive, and experiential learning experiences that are relevant to the development of workforce-related skills.

One large university shared a detailed response describing its strategic approach to meet complex learner needs through high-quality online offerings:

Our over-arching goal is to support the integration of online learning strategies that have the potential to transform instructional approaches and respond to needs across academic program contexts.

Our institutional framework aims to explore the affordances of online learning for improving flexibility, enhancing learner experience and supporting student success in the following dimensions:

Access (at a distance, flexibility for full-time degree program students; convenience for part-time; open courses;

Temporal (learning at time and pace preferred by learner, flexible start and end dates)

Program path (smaller courses to pick and mix, speeding up or catching up)

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 26

Content (varied digital media, mobile, interactive, learner-generated, collaboratively created)

Format (synchronous, asynchronous, web option, self-directed modules)

Instruction and assessment strategies (innovative active learning; personalized formative feedback, authentic assessments)

Our exploration of online learning occurs across a range of strategy domains including fully online, hybrid and MOOCs. Faculty development and funding program initiatives provide support for the diverse interests and needs of our instructors and learners to ensure high-quality outcomes

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 27

PERCEPTIONS OF ONLINE LEARNING

The majority of institutions in Ontario do not yet perceive online learning to be equivalent to face-to-face learning.

Ontario Key Reporting Metrics:
Improving quality and driving innovations in technology-enabled teaching and learning practice

Nationally, a slight majority (57%) of institutions held the perception that online credentials have the same level of respect as face-to-face credentials. In Ontario, just under half of the responding institutions (49%) held this perception.

Fewer institutions in Ontario (28%) agreed that students were at least as satisfied with an online course compared to the national results (36%); however, institutions in Ontario were less likely to report that retaining students is a greater problem for online courses. Ontario institutions were slightly more likely to state that faculty at their school recognize the value and legitimacy of online courses.

In Ontario, institutions also held a greater perception that students need more discipline to succeed in an online course (44% of Ontario institutions agreed with this statement compared to 29% nationally).

PERCEPTIONS OF ONLINE LEARNING

Statement	Ontario	National
Online credentials have the same level of respect	49%	57%
Students are at least as satisfied with an online course	28%	36%
Faculty at my school accept the value and legitimacy of online education	35%	31%
Students need more discipline to succeed in an online course	44%	29%
Retaining students is a greater problem for online courses	14%	21%

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 28

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

Considering that the vast majority of institutions in Ontario consider online learning to be very or extremely important to their long-term plan, the perceptions surrounding online learning should be investigated further. Being that some institutions shared in open-ended comments that improving the quality of online offerings is an important part of their strategic plan, it will be interesting to explore whether and how perceptions of online learning among Ontario institutions change over time.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 29

STRATEGIC IMPORTANCE OF ONLINE LEARNING

Ontario institutions consider online learning to be of strategic importance for improving growth, access, and the development of knowledge and skills for today's workforce.
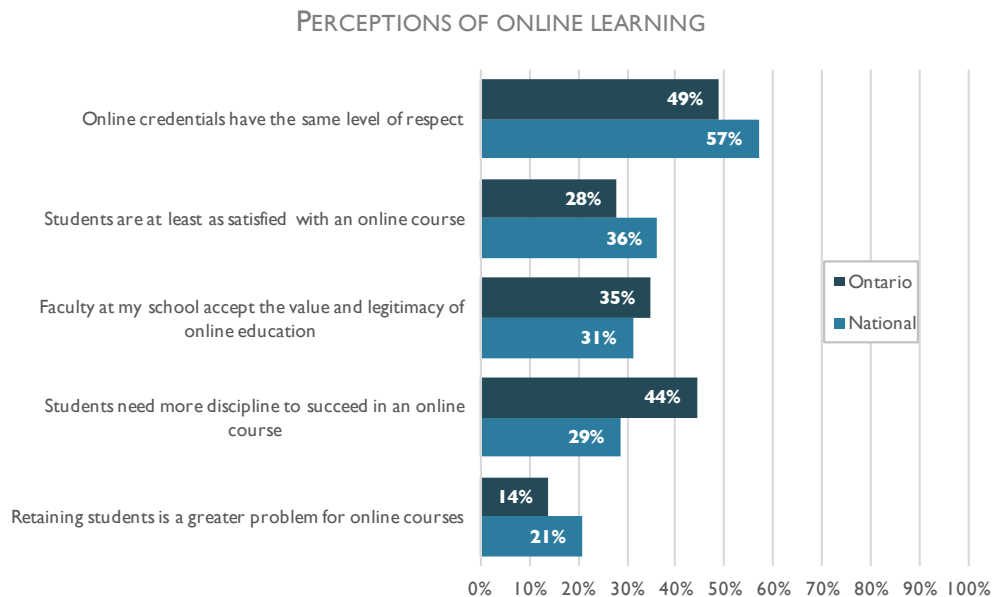
Ontario Key Reporting Metrics:

Improving quality and driving innovations in technology-enabled teaching and learning practice

Improving learning in technical subject areas

The survey provided institutions with a list of reasons why online learning may be important. Respondents were asked to select all that applied.

In Ontario, the four most reported reasons why institutions considered online learning to be strategically important were: to increase student access (91%), to attract students from outside the traditional service area (91%), to develop the knowledge and skills that students need today (88%), and to grow continuing and/or professional education (83%). These four reasons topped the national results, although in a different order.

The Ontario results related to the strategic importance of online learning reflected the national results with most differences being minor. One area where the difference between the Ontario and national results was greater concerned offering online learning to optimize campus utilization. More institutions in Ontario (84%) reported this as being important compared to the national response (69%).

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 30

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

STRATEGIC IMPORTANCE OF ONLINE LEARNING

Category	Ontario	National
Grow continuing and/or professional education	83%	94%
Increase student access	91%	92%
Attract students from outside the traditional service area	91%	86%
Develop the knowledge and skills students need today	88%	82%
Maintain enrolment numbers	74%	79%
Provide pedagogic improvements	81%	73%
Increase rate of credential completion	74%	74%
Optimize campus utilization	84%	69%
Enhance value of college/university brand	74%	68%
Increase the diversity of student body	63%	65%
Improve student retention	74%	68%
Reduce or contain costs	40%	39%

The results also reflect a greater perception among institutions in Ontario that online learning is strategically important for providing pedagogical improvements and improving student retention.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 31

BARRIERS TO THE ADOPTION OF ONLINE EDUCATION

Institutions in Ontario identified inadequate training for faculty as the top barrier for the adoption of online learning, which highlights the need to train educators for digital fluency.

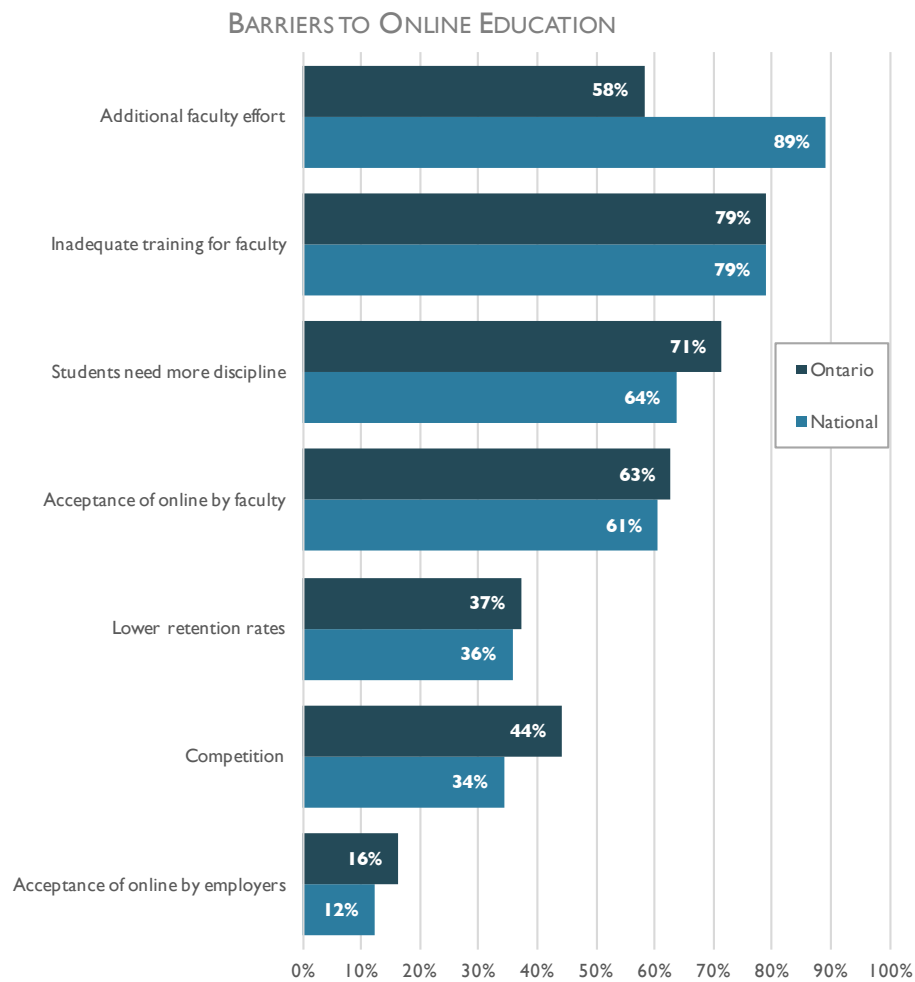*Ontario Key Reporting Metrics:*

Training educators for digital fluency

At the national level, 89% of institutions reported that the 'additional faculty effort' required for online learning was a barrier, placing this as the top barrier nationally. However, institutions in Ontario did not share this sentiment and ranked 'additional faculty effort' much lower (58%).

The top barrier to the adoption of online education reported by institutions in Ontario was 'inadequate training for faculty' with 'students need more discipline' reported as a close second.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 32

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

Further investigation is recommended to explore the reasons for the discrepancy between Ontario and the rest of the country regarding the perception that 'additional faculty effort' is required for teaching online. Considering the other results related to barriers were comparable between Ontario and the rest of Canada, this discrepancy may be indicative of the supports within Ontario's public post-secondary system (e.g. Contact North, eCampusOntario, OntarioLearn), which reduce the perception that teaching online requires more faculty effort. At the same time, it is important to acknowledge that the results reflect perceptions at an institutional level and that a survey of faculty perceptions may yield different results.

BARRIERS TO ONLINE EDUCATION

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 33

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne
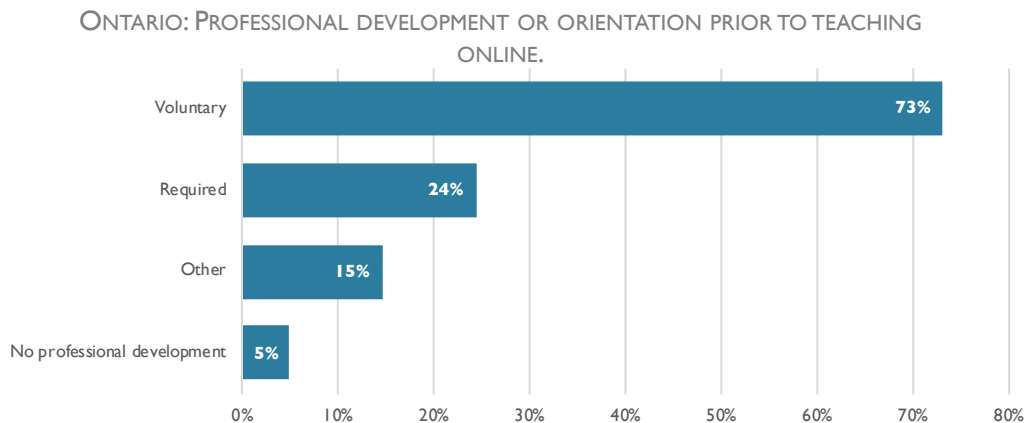
PROFESSIONAL DEVELOPMENT FOR DIGITAL FLUENCY

Consistent with the national results, professional development before teaching online and for experienced online faculty remains mostly voluntary.

Ontario Key Reporting Metrics:

Training educators for digital fluency

Inadequate training for faculty was identified as the primary barrier to the adoption of online education by institutions in Ontario. Developing digital fluency among faculty appears to be a priority in Ontario with more institutions (73%) providing voluntary professional development opportunities for faculty before teaching online compared to the national average (58%). Only 5% of institutions reported that they did not offer any professional development before teaching online, compared to 11% nationally.

No Ontario university reported that they require professional development for teachers new to online, whereas 46% of colleges do require this training.

ONTARIO: PROFESSIONAL DEVELOPMENT OR ORIENTATION PRIOR TO TEACHING ONLINE.

Category	Percentage
Voluntary	73%
Required	24%
Other	15%
No professional development	5%

For experienced faculty teaching online, 73% of institutions offer voluntary professional development. The proportion of Ontario institutions that offer voluntary professional development for experienced faculty is higher than the national average at 90%. Colleges and universities are equally likely to provide this training: 91% of colleges and 90% of universities have voluntary professional development for teaching online available to faculty.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 34

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

As in the rest of Canada, a small minority of Ontario institutions require professional development for faculty both before teaching online or on an ongoing basis. One large college stated their intention to shift from a voluntary to a mandatory approach to professional development for online faculty:

> *Currently, the professional development provided for faculty prior to teaching online is voluntary but the intent is to create a more formal mandatory certification program.*

Other open-ended responses provided further insight into the nature of professional development offered by institutions in Ontario to improve digital fluency among faculty:

> *Required in Centre for Continuing and Online Learning, voluntary for in on-campus faculty wanting to teach online. (Large college)*

> *We have a variety of supports available but no formal mandated training. (Large college)*

> *Staff work with some faculty to develop their online course so they may get extensively trained. Other faculty do not and so may not get any individualize training. There are also voluntary PD workshops in online teaching. (Large college)*

> *Both full-time and part-time faculty are obligated to participate in professional instructional development at the outset of their career with the college. An orientation to teaching with technologies and to the college LMS is included in these programs. (Large college)*

> *Synchronous programming through Contact North has mandatory orientation and training. Asynchronous programming through OntarioLearn is voluntary and done on a per-faculty need. (Medium college)*

> *PD and support are offered on an ongoing basis from consultation to workshops, formal courses, a certificate program, and grants and awards. (Large university)*

> *While there are resources and orientation opportunities, they are not 'required' in order to teach online. (Large university)*

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 35

FUTURE DEVELOPMENTS

Responses from institutions in Ontario about their future developments in digital learning focused on growth, quality, and innovation.

<div style="border:1px solid black; background:#e0e0e0;">

Ontario Key Reporting Metrics:

Promoting innovation in technology-enabled teaching and learning practice

Improving quality and driving innovation in online and technology-enabled learning

</div>

As part of the survey, respondents were asked to comment on future developments being planned for their institution. Three main themes emerged from the open-ended comments provided by institutions in Ontario: growth, quality, and innovation.

Concerning growth, institutions described their plans and expectations for the expansion of online and blended/hybrid offerings:

We expect the adoption of blended learning to continue at our university. We anticipate that the online learning experience here will be enhanced, with specific efforts to increase student engagement and success. It is also likely that online learning course offerings will increase as the institutional models for developing and delivering online courses are refined and refocused to student-centered online course models. Additionally, we are in the midst of reviewing our Learning Management System to ensure that we understand the requirements of our students, faculty. TAs, and staff. A significant consideration in the review is how does this key tool support our blended/online teaching. (Large university)

We are continuing to invest heavily in the design, development, and delivery of hybrid and online learning. We are also providing enhanced efforts on the scholarly research related to hybrid and online teaching and learning. (Large college)

Our college has invested heavily in online learning for the past 3 years. We plan to offer one new program per year. (Medium college)

We will continue to grow hybrid and online learning. (Medium college)

We will be launching hybrid courses (joining on-campus and online students into one course section) that are designed to ensure successful completion of completely online students. (Large university)

Our college has intentions of having more online learning programming made available but in adult education as well as in professional development. (Medium college)

Our college is undergoing re-structuring with an expanded investment in program development. These changes are part of the larger strategic plan. (Medium college)

Currently, interest in hybrid learning is increasing across all program areas. Graduate Professional Masters programs, in particular, are expanding online and hybrid options. (Large university)

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 36

Continuing Education has been re-launched at our institution and part of our mandate is expanding online CE. A number of departments have initiatives to increase the number of online and hybrid courses and programs (particularly the latter). (Large university)

Other institutions highlighted the importance of ensuring and improving quality in their existing and forthcoming technology-enabled offerings:

Confirmation that our online courses are well-aligned with current industry practice. (Large college)

The goal is always to improve how and what we build when it comes to our digital experiences. We are making a more concerted effort when it comes to how we select future builds and we continue to review how new technologies (VR, AR, AI and machine-learning) can better integrate into our online and digital course offerings. (Large college)

We are planning to expand our credit online and blended programming as well as starting to develop noncredit programs as well. We have recently completed a university-wide online education planning exercise to look at ways to improve the student experience. The results suggest that we should centralize our online processes (portal, brand, admission, registration, exam and student experience) to better serve our students who often take courses across different faculties or do not know to which faculty a course belongs. (Large university)

Pace of development is dependent on instructional design resource enhancement to support faculty in developing high-quality courses, as well as adjusting workload allocation to faculty to allow for course development. Development of online programs to attract international students is a priority. (Large university)

Several institutions described how they are planning to innovate with technology-enabled teaching and learning practices:

[We are] implementing an external CMS this year to expand our online readiness program for students, working on a dedicated site for video production and support for faculty, implementing an HT5 pilot, actively involved in OER development with eCampusOntario, adapting our first OER's, expanding our online CE offerings, expanding our online part-time offerings on OCAS. (Large college)

Our newly minted strategic plan includes a commitment to embracing technology and digital tools. (Large college)

Integrate more technology in online courses (Large university)

We continue to collaborate with faculty and other departments at our institution to develop new online courses and programs relevant to today's economy and workforce. We are recommending to subject-matter experts (SMEs) that they research and try to use open resources e.g. images, diagrams, wherever possible when creating content. (Large university)

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 37

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

We are planning to expand our credit online and blended programming as well as starting to develop noncredit programs as well. We have recently completed a university-wide online education planning exercise to look at ways to improve the student experience. The results suggest that we should centralize our online processes (portal, brand, admission, registration, exam and student experience) to better serve our students who often take courses across different faculties or do not know to which faculty a course belongs. (Large university)

We are looking to add technologies to support all of our courses not only for online or blended. We are adding crowd-sourced marking generally, introducing more video conferencing with synchronous meetings for both instructors and students, working to allow more seamless integration of video and audio resources (especially for students) into course work. iClicker now allows us to poll synchronously or asynchronously in outside the physical classroom (though no one is doing that yet). We're working with the library to place more course-specific materials into courses and to provide links to course reserve materials. (Large university)

Overall, the open-ended comments revealed that many institutions are planning to grow their technology-enabled offerings and that the development of quality online offerings is being considered as institutions launch innovative initiatives.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 38

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

INSTITUTIONAL INSIGHTS

Institutions are interested in learning more about how other institutions are implementing technology-enabled learning.

Ontario Key Reporting Metrics:

Providing ongoing access and support for free and open resources for use by students and instructors in Ontario institutions

Reducing duplication in educational technology purchasing practices

Deploying a micro-certification platform across the higher education sector

Improving the user experience for Ontarians searching for online training or education programs through the eCampus Ontario portal

Institutions were invited to share what other information they would like to have collected in future years of the survey. The responses from Ontario indicated that institutions are interested in learning more about the innovations, structures, and supports used to facilitate online learning at other institutions.

Where does the online activity "reside" at the institution. How are you staffed to support online learning activities? (Large college)

Time allocated to all aspects of online learning. For example, how much time is allocated to faculty for writing content, instructional design, development, and quality assurance for an average 42-hour course? Does your institution use quality standards? Quality Matters? Internally Developed? Other? What roles exist on your online learning team? E.g., Instructional Designers, Technical Developers, Quality Assurance Specialists, Curriculum Consultants, etc. On average, how many new courses does your institution develop each year? How many fully online programs are currently available at your institution? (Large college)

It might be valuable to include one or more questions on learning management systems and the human resources dedicated to online course development and delivery. It would also be interesting to learn more about online micro offerings and new technologies that universities have had particular success as well as less than satisfactory experiences. Questions that would reveal who is doing what in terms of evaluation and research of contemporary online education would also be appreciated. (Large university)

We would be interested to learn more information about the range of authoring tools in current use and comparative data regarding the staffing and support service models for online learning course design, development, delivery, and renewal. (Large college)

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 39

Information regarding strategies and successes attracting and retaining high-quality personnel (instructional designers, LMS, and multimedia specialists). The nature and significance of challenges in developing and delivering high quality online and blended programs. Efforts to Indigenize online courses and components/learning objects. Progress/challenges meeting full implementation of the AODA (Ontario's Accessibility legislation) 2020 standards (or one's own provincial standards). (Large university)

Use of Artificial Intelligence like chatbots or TA systems to recruit and support online learners. (Large university)

We would appreciate information on strategies and/or technologies used to improve academic integrity in online courses. (Large university)

It would be helpful to know what kind of student supports other institutions are offering for both on-ground students in online courses as well as those in fully online programs. It would also be useful to know how many students are in fully online programs vs. those taking online courses to supplement on-campus programs. (Large university)

This interest in how other institutions are improving quality and driving innovation in technology-enabled teaching and learning may also provide a springboard for collaborative initiatives. One medium college asked if future surveys could investigate *"if there are any other institutions open to collaboration and partnership for developing online programming"*.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 40

CONCLUSIONS

In alignment with the national-level findings, many of Ontario institutions are invested in expanding and enhancing their online and blended/hybrid offerings. As new technologies, delivery modalities, and opportunities for alternative credentialing emerge, institutions in Ontario are embracing ways to offer innovative, relevant, and high-quality technology-enabled learning experiences. Online learning appears to be well-established and continues to be a critical part of the long-term, strategic plan for most institutions.

At the same time, Ontario faces similar challenges seen in the rest of the country. Although online learning is considered important, only a slight majority (55%) of institutions reported that a strategic plan for e-learning was either fully implemented (12%) or being implemented (43%). Most of the remaining institutions, however, were either developing a plan or acknowledged a need for one and the open-ended comments in the future developments section described some of these forthcoming plans.

The results also revealed that inadequate training for faculty is the primary barrier to the adoption of online education in Ontario. Most institutions offer some sort of professional development for faculty that teach online, but few institutions make professional development for digital fluency a requirement. Mandated or incentivized approaches to professional development for faculty teaching online may prove beneficial for overcoming this barrier.

The data and open-ended comments revealed that Ontario institutions value the use of OER and have some concern that the cost of course materials may be a barrier to students. Despite a shift in funding support for the direct development of OER, some institutions described institutional-level strategies and incentives for OER adoption. Further investigation of OER development among institutions in Ontario, especially following this funding shift, may offer additional insight for ways to provide increased and ongoing access to OER for students and faculty.

Ultimately, the Ontario-specific results of the survey signal that continuing to increase and improve technology-enabled learning is a priority for most institutions in Ontario. The widespread adoption of a range of technologies and online delivery modalities indicates that Ontario is approaching a mature state of technology adoption with technology-enabled instruction becoming more the norm than the exception.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 41

METHODOLOGY

The universe of interest for this study is all publicly-funded post-secondary institutions in Canada.

Almost all universities in Canada are funded provincially. There were multiple changes to the roster of institutions between 2017 and 2018, and only one change between 2018 and 2019. Based on feedback from Québec following the 2017 survey, three Québec institutions that were previously treated as constituent components of the Université de Montréal were added as independent institutions. Also, in 2018, the scope was expanded to include federally-funded post-secondary institutions, adding The Royal Military College of Canada (which has university status) to the roster.

A further change in 2018 was the decision to treat francophone colleges within Anglophone universities as a separate roster entry, as they offer separate academic programs and require a separate questionnaire in French. This resulted in an additional five university-type institutions compared to those included in the 2017 roster. Finally, one provincially-funded institution changed its status from a college to a university between 2017 and 2018. There was only a single change in the roster between 2018 and 2019 when the activities of the institution formerly known as Cégep à distance were integrated with Collège de Rosemont.

Beginning in 2018, 'private subsidized colleges' in Québec were added to the roster. These establishments are recognized as a public interest and approved for subsidies by the Minister responsible for Higher Education that are fully accredited within the province.

Institutions that are not included in the roster include Canadian private for-profit universities, most of which are very small, as well as fully private career colleges and institutes.

The 2019 roster includes:

- 82 universities and Francophone colleges of Anglophone universities
- 80 colleges outside Québec
- 51 CEGEPs
- 21 private subsidized colleges in Québec

The resulting roster includes 152 colleges and 82 universities for a total of 234 institutions.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 42

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

Questionnaire design and distribution

The initial questionnaire design for 2017 was based on surveys used in the U.S. by the Babson Survey Research Group, that were modified to meet the Canadian context. From 2017 to 2018 several questions were dropped where the information was not likely to change significantly from year to year. The 2018 survey also reflected the additional work on definitions and included questions to allow institutions to compare their definitions with those of the survey team. While the bulk of the survey remained the same from 2018 to 2019, some changes were made for 2019, adding additional questions on open resources, faculty professional development, and the location of online students

All changes to the survey have been tested in pre-surveys. The definitions and enrolment questions in 2018 were tested in a pre-survey that went to all potential participating institutions for feedback and comment. This outreach was also used to update the contact information for each institution. A second pre-survey was conducted in 2019 asking institutions what information they tracked and could supply for proposed enrolment tracking questions.

A survey invitation was sent to the Provost/VP Academic or Vice-President Education or Directeur général for each institution on the roster, with copies to the other institutional contacts. The questionnaire content was identical in both Anglophone and francophone versions of the questionnaire.

The questionnaire itself was a fillable PDF file, that could be shared among multiple people at the institution. Members of the project team actively followed up with institutions to answer any of their questions and to encourage them to participate. The project was also promoted through post-secondary educational networks or provincial organizations.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
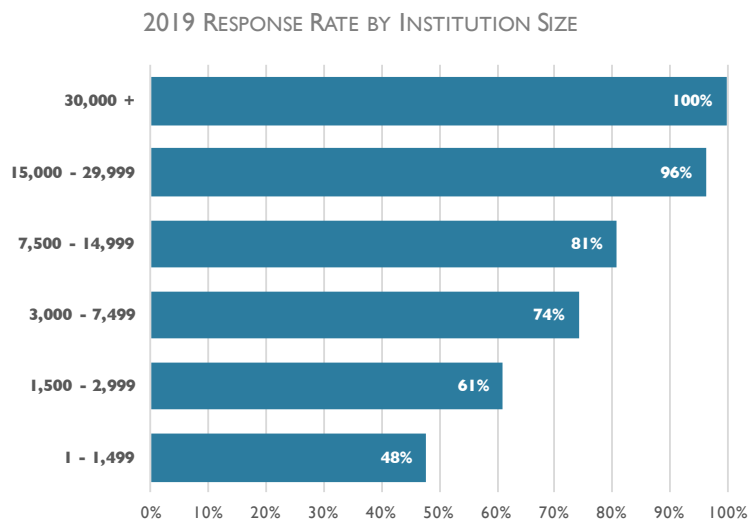2019 National Survey of Online and Digital Learning
Page 43

The overall institutional response rate was 70% for all types of institutions. Responses were highest from universities (80%) and lowest from the 21 private subsidised colleges in Québec (38%).

2019 RESPONSE RATE BY INSTITUTION TYPE

University — 80%
Cégep — 71%
College — 66%
Private subsidized college — 38%
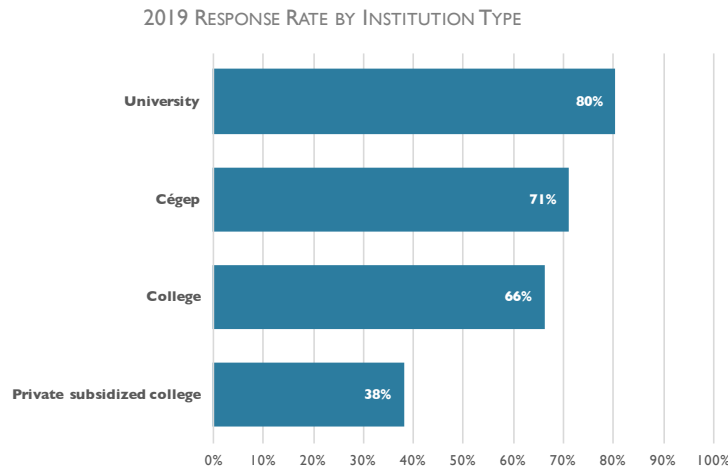
The response rate tended to be lower from the smaller institutions; nevertheless, close to half of even the smallest institutions responded. Since there was a higher response from the larger institutions, the questionnaire responders represent institutions with 90% of the student population base and 95% of all online enrolments.

2019 RESPONSE RATE BY INSTITUTION SIZE

30,000 + — 100%
15,000 - 29,999 — 96%
7,500 - 14,999 — 81%
3,000 - 7,499 — 74%
1,500 - 2,999 — 61%
1 - 1,499 — 48%

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 44

Overall, especially considering that this was a voluntary questionnaire, the responses provide an excellent, representative sample of colleges and universities across all provinces, and across all sizes of institutions, representing 70% of all institutions and 90% of all students studying for institutional credit at Canadian publicly-funded post-secondary institutions.

Questions on course registrations

Survey questions addressing numbers of course registrations and numbers of students have been revised each year based on feedback from responding institutions. The 2017 questionnaire included several enrolment questions, which proved difficult (or impossible) for many institutions to answer. The 2018 survey scaled this back considerably to include only six questions: three on overall enrolments and three on online enrolments. A pre-survey conducted ahead of the 2019 main survey provided even more feedback, resulting in a further reduction in the number of questions to only four: two on overall enrolments and two on online enrolments.

The fact that it remains difficult for many institutions to provide data consistent with the survey questions is to be expected. The lack of a universal reporting requirement, the differing reporting standards for each province, and the wide-ranging internal tracking requirements for the institutions themselves have resulted in multiple systems designed to meet specific institutional and governmental agencies reporting objectives.

A further complication is that, while the question of 'how many students?' may sound simple, it is anything but. Provinces and institutions can have widely ranging definitions of what constitutes a 'student'. Questions arose and included: Should institutions count all students or convert part-time counts into full-time equivalents (FTE)? Should institutions count all students or only students taking for-credit courses or programs? Do students in continuing education or other non-core programs count as part of the main institution? Should institutions count only those being supported by a particular program or all of the students, regardless of their support?

All of these factors lead to considerable variability in what each institution can measure and report, making reliable comparisons across institutions extremely difficult. However, it is possible to compare the same data element across time for the same institution, provided that an identical question is being asked at each point in time. The year-to-year comparisons in this report use an identical question on total online course registrations over the academic year.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 45

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

BACKGROUND TO THE 2019 NATIONAL SURVEY

Collectively, the National Survey aims to cover all types of publicly-funded post-secondary institutions within every province and territory. The inaugural survey was launched in 2017 and, over time, we have modified the questions in response to suggestions from responding institutions.

Since our inception, we have developed, and are continuously revising, a comprehensive roster of all publicly-funded post-secondary institutions. This is part of an ongoing effort to build a strong relationship between the research team and every post-secondary institution in our roster. We strive to acknowledge and portray the diversity in post-secondary institutions in our endeavors.

From its outset, the survey has been a bilingual undertaking, acknowledging that the provincial post-secondary system in Quebec differs significantly from other provincial and territorial jurisdictions. We also recognize that there is a significant number of francophone institutions across Canada.

Each year, we review the responses, suggestions, and advice that responding institutions share with us. In early 2019, we sent a preliminary survey to determine whether institutions would be able to provide data on new areas of interest. Our research team collected, analyzed, and integrated responses from the preliminary survey into the 2019 Canadian National Survey of Online and Digital Learning. The survey launched in April and data collection concluded in July. We received a small number of responses in August and included these in the data analysis.

We invite you to reach out to our research team to offer feedback and suggestions for future surveys and research projects that investigate digital learning at post-secondary institutions across Canada.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 46

Canadian Digital Learning
Research Association
Association canadienne de
recherche sur la formation en ligne

2019 PRIMARY RESEARCH TEAM

Nicole Johnson is the newly appointed Research Director of the Canadian Digital Learning Research Association. She was the primary author for the 2019 National Report and works closely with Dr. Tony Bates, Dr. Jeff Seaman and Dr. Tricia Donovan. She is currently an online PhD student in the Education and ICT (e-learning) program at the Open University of Catalonia in Barcelona, Spain, while residing in Abbotsford, B.C. Nicole completed her Master of Educational Technology degree online through UBC and also holds Bachelor degrees in Education and Human Kinetics from UBC. Additionally, Nicole is currently part of a research team at Royal Roads University that is exploring the nature of academics' online participation over time.

Dr. Tony Bates is currently a Senior Advisor at the Chang School of Continuing Education, Ryerson University. He is also a Research Associate at Contact North|Contact Nord. He has 50 years of experience in using technology for teaching, including teaching online, managing online programs, conducting research into educational technologies, and consulting on digital learning strategies and management. Tony has pioneered the Canadian National Survey and is a Director of the Board, CDLRA/ACRFL.

Dr. Jeff Seaman has worked in education information technology his entire career and currently serves as Director of the Babson Survey Research Group. His experience includes creating and running the Computing Resource Center at the University of Pennsylvania, Chief Technology Officer at HighWired.com, Vice President of Engineering for Vista Associates, and Chief Information Officer for Lesley University. He has taught at multiple institutions and served on numerous academic technology advisory boards including Apple Computer, IBM, and Microsoft.

Dr. Tricia Donovan is currently the Principal, eCampus at NSCC. She has over twenty years of experience with online, distance and digital education with colleges, universities and consortia. She was the Executive Director, eCampusAlberta for 15 years and works closely with the eCampus organizations across Canada and in partnership with WCET in the United States. She has experience in working with online and digital learning strategic planning, quality assurance in online learning and consultation. Tricia also serves as Project Lead for the National Survey and is a Director of the Board.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 47

2019 EXECUTIVE CONSULTANTS

The Canadian National Survey is made possible through the dedication and commitment of our team of Executive Consultants. Their collective experience and understanding of the Canadian post-secondary system, and of research in online and digital learning, is unparalleled.

Dr. Denis Mayer, is currently serving as interim Board Chair for the Higher Education Quality Council of Ontario (HEQCO) and is a board member of the Canadian Digital Learning Research Association. Formerly at Laurentian University he led Continuing Education and Student Affairs and was involved in distance and online learning regionally, provincially and nationally. He chaired the board of the Canadian Virtual University, the board of the Canadian Association for Distance Education and was a board member for the Ontario Council for University Lifelong Learning and Contact North. He now does consulting in distance education and online learning.

Dr. Brian Desbiens currently is coaching CEO and Senior Executive teams at six institutions (University, College, Health Care and educational support agencies) in Ontario. He is a Research Associate at Contact North|Contact Nord. He is a past President of Sir Sandford Fleming College and worked in the college system for 36 years. He is an Adjunct Professor in the Higher Education Department of the Ontario Institute of Education at the University of Toronto and teaches Leadership in the doctoral program.

Éric Martel is currently Director of distance learning at Université Laval. He is also a Lecturer in the Department of Management at Université Laval and has been teaching undergraduate and graduate online courses since 2002. He has over ten years of experience in managing online programs, recruiting students in online programs and developing online courses.

Dr. Ross Paul spent more than 35 years in senior academic administrative positions in Canadian colleges and universities including presidencies at Laurentian University and the University of Windsor. He has written extensively on leadership and management issues and is best known for his books Open Learning and Open Management: Leadership and Integrity in Distance Education (1990) and Leadership Under Fire: The Challenging Role of the Canadian University President (2nd edition, 2015).

Vivian Forssman has expertise in online learning strategy, program development, learning design, and technology operations. She is currently part of a team focused on climate change with the BC Professionals Adaptation Network Project. From 2013 – 2017 she served as the Director of the Centre for Teaching and Educational Technologies at Royal Roads University, providing pedagogical and technical support for faculty; implementing learning technologies; and improving curricular alignment through program mapping services. She holds an MBA from the University of Cape Town, and undertook doctoral research focused on technology policy in higher education, through Simon Fraser University, in the period 2004-2008.

Russ Poulin is the Executive Director, WICHE Cooperative for Educational Technologies (WCET), Vice President for Technology-Enhanced Education, Western Interstate Commission for Higher Education (WICHE). Russ has more than 20 years of experience focused on the practice, policy, and advocacy of technology -enhanced learning in higher education. Russ, and WCET, have partnered with CDLRA/ACRFL and have worked in concert with eLearning consortia in both the United States and Canada. He has received recognition from the Presidents' Forum, Excelsior College, and the National University Technology Network for his contributions to policies for technology-enhanced postsecondary education. Poulin received a bachelor's degree from the University of Colorado Denver and a masters from the University of Northern Colorado.

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 48

ROSTER OF INSTITUTIONS

Alberta
Alberta University of the Arts
Athabasca University
Bow Valley College
Centre Collégial de l'Alberta - Campus Saint-
    Jean
Grande Prairie Regional College
Keyano College
Lakeland College
Lethbridge College
MacEwan University
Medicine Hat College
Mount Royal University
Norquest College
Northern Alberta Institute of Technology (NAIT)
Northern Lakes College
Olds College
Portage College
Red Deer College
SAIT Polytechnic
University of Alberta
University of Calgary
University of Lethbridge

British Columbia
British Columbia Institute of Technology
Camosun College
Capilano University
Coast Mountain College
Collège Éducacentre
College of New Caledonia
College of the Rockies
Douglas College
Emily Carr University of Art and Design
Justice Institute of British Columbia
Kwantlen Polytechnic University
Langara College
Nicola Valley Institute of Technology
North Island College
Northern Lights College

Okanagan College
Royal Roads University
Selkirk College
Simon Fraser University
The University of British Columbia
Thompson Rivers University
University of Northern British Columbia
University of the Fraser Valley
University of Victoria
Vancouver Community College
Vancouver Island University

Manitoba
Assiniboine Community College
Brandon University
Canadian Mennonite University
Manitoba Institute of Trades and Technology
Red River College
The University of Winnipeg
Université de Saint-Boniface
University College of the North
University of Manitoba

New Brunswick
Collège communautaire du Nouveau-Brunswick
    - Campus d'Edmundston
Maritime College of Forest Technology
Mount Allison University
New Brunswick College of Craft and Design
New Brunswick Community College
St. Thomas University
Université de Moncton
University of New Brunswick -St. John

Newfoundland and Labrador
College of the North Atlantic
Memorial University of Newfoundland

Northwest Territories
Aurora College
Collège Nordique francophone

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 49

Nova Scotia
Acadia University
Canadian Coast Guard College
Cape Breton University
Dalhousie University
Gaelic College
Mount Saint Vincent University
Nova Scotia Community College (NSCC)
NSCAD University
Saint Mary's University
St. Francis Xavier University
Université Sainte-Anne

Nunavut
Nunavut Arctic College

Ontario
Algoma University
Algonquin College
Brock University
Cambrian College
Canadore College
Carleton University
Centennial College
Collège Boréal
Conestoga College Institute of Technology and
    Advanced Learning
Confederation College of Applied Arts and
    Technology
Durham College
Fanshawe College
Fleming College of Applied Arts and Technology
George Brown College of Applied Arts and
    Technology
Georgian College of Applied Arts and
    Technology
Glendon College
Humber College
La Cité
Lakehead University
Lambton College
Laurentian University

Loyalist College of Applied Arts and Technology
McMaster University
Mohawk College
Niagara College
Nipissing University
Northern College
OCAD University
Ontario Tech University
Queen's University
Royal Military College of Canada
Ryerson University
Sault College
Seneca College
Sheridan College
St. Clair College
St. Lawrence College of Applied Arts and
    Technology
The Michener Institute of Education at UHN
Trent University
Université de Hearst
University of Guelph
University of Ottawa
University of Toronto
University of Waterloo
University of Windsor
Western University
Wilfrid Laurier University
York University

Prince Edward Island
Collège de l'Île-du-prince-Edouard
Holland College
University of Prince Edward Island

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 50

Québec

Bishop's University
Campus Notre-Dame-de-Foy
Cégep André-Laurendeau
Cégep Beauce-Appalaches
Cégep de Baie-Comeau
Cégep de Chicoutimi
Cégep de Drummondville
Cégep de Granby Haute-Yamaska
Cégep de Jonquière
Cégep de l'Abitibi-Témiscamingue
Cégep de l'Outaouais
Cégep de la Gaspésie et des Îles
Cégep de La Pocatière
Cégep de Lévis-Lauzon
Cégep de Matane
Cégep de Rimouski
Cégep de Rivière-du-Loup
Cégep de Saint-Félicien
Cégep de Saint-Hyacinthe
Cégep de Saint-Jean-sur-Richelieu
Cégep de Saint-Jérôme
Cégep de Saint-Laurent
Cégep de Sainte-Foy
Cégep de Sept-Îles
Cégep de Sherbrooke
Cégep de Sorel-Tracy
Cégep de Thetford
Cégep de Trois-Rivières
Cégep de Victoriaville
Cégep du Vieux Montréal
Cégep Édouard-Montpetit
Cégep Garneau
Cégep Heritage College
Cégep John Abbott College
Cégep Limoilou
Cégep Marie-Victorin
Cégep régional de Lanaudière
Cégep Vanier College
Centre Matapédien d'études collégiales
Champlain Regional College
Collège Ahuntsic

Collège André-Grasset
Collège Bart
Collège Centennial
Collège d'Alma
Collège de Bois-de-Boulogne
Collège de Maisonneuve
Collège de Rosemont
College de Valleyfield
Collège Ellis
Collège Gérald-Godin
Collège international des Marcellines
Collège international Marie de France
Collège Jean-de-Brébeuf
Collège Laflèche
Collège LaSalle
Collège Lionel-Groulx
Collège Marianopolis
Collège Mérici
Collège Montmorency
Collège O'Sullivan de Québec
Collège Shawinigan
Collège Stanislas
Collège TAV
Collège Universel - Campus Gatineau
Collégial international Sainte-Anne
Concordia University
Dawson College
École de musique Vincent-d'Indy
École de sténographie judiciaire
École de technologie supérieure
École nationale d'administration publique
École nationale de cirque
École Polytechnique de Montréal
HEC Montréal
Institut de technologie agroalimentaire
Institut de tourisme et d'hôtellerie du Québec
Institut national de la recherche scientifique
McGill University
Séminaire de Sherbrooke
TÉLUQ
Université de Montréal

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 51

Université de SherbrookeUniversité du Québec
    à Chicoutimi
Université du Québec à Montréal
Université du Québec à Rimouski
Université du Québec à Trois-Rivières
Université du Québec en Abitibi-Témiscamingue
Université du Québec en Outaouais
Université Laval

Saskatchewan
Carlton Trail College
Collège Mathieu - Sadkatchewan
Cumberland College
Great Plains College
La Cité Universitaire francophone de
    l'Université de Régina
North West Regional College
Northlands College
Parkland College
Saskatchewan Polytechnic
Southeast College
University of Regina
University of Saskatchewan

Yukon
Yukon College

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 52

CONTACT:

Canadian Digital Learning Research Association

Association canadienne de recherche sur la formation en ligne

Web: onlinelearningsurveycanada.ca

Canadian Digital Learning Research Association
Association canadienne de recherche sur la formation en ligne
2019 National Survey of Online and Digital Learning
Page 53