

Outlook and conclusion

A year ago the hot topic of conversation among online educators and policymakers was the book *Disrupting Class*, which predicted that half of all high school courses would be online within a decade, signaling a market-driven transformation of American education not unlike that unleashed by the personal computer upon American business. While in agreement with many aspects of the book, *Keeping Pace* cautioned that neither the growth nor the transformation anticipated by *Disrupting Class* was a sure thing. High growth rates in the early years of online learning did not guarantee that such growth would continue or would fundamentally change American education, in particular because public education is not a free market, and because students and parents often are not the primary purchasers or decision-makers regarding their online options in many states.

As of late 2009, both sides of the argument have evidence in their favor. Those who believe such a transformation is already underway can point to the steady growth (in the range of 25%-40%) of many state virtual schools, online school providers operating nationally, and total online student populations in states, along with the number of states that have created new online schools for the first time for school year 2009-10. Meanwhile, the skeptics can point to lingering misgivings about online learning as evidenced by a handful of states where online learning options were restricted in 2009.

Accelerating growth

Our view is that the growth line will continue to trend sharply upward. Among the states where online options are not growing, we are hopeful that the situation is temporary. In states where growth has slowed due to budget constraints, we expect investments to again be made in transforming learning when state budgets rebound in the next several years. In states in which politics and policy questions have slowed the expansion of online learning, we expect that the pattern from previous policy debates in states such as Wisconsin, Pennsylvania, and Colorado will continue, and ultimately policymakers will weigh the evidence and allow for the development or expansion of online options.

Our views about growth are cemented by the significant activity now emerging at the individual school district level. School districts are where most American education trends reach lasting scale, if only because the local school district remains the place where the large majority of students “go to school.” State virtual schools, online charter schools, consortia of online programs, and other non-district programs have, to this point, been the catalysts of most online learning activity. Those programs have grown rapidly but still reach a very small percentage of the overall student population—not much more than 1% nationally, and within single digit percentages even in the states with the most online learning activity. Individual school districts are now becoming much more involved with online learning, with their involvement taking countless different paths. Some

are working in partnership with state virtual schools and sending ever-larger number of students to these schools; some are working with national online course or program providers to offer their own online options; some are creating their own programs, either developing their own courses or using the open educational resources available online. We see the bulk of growth in K-12 online learning in the next several years taking place primarily in these district programs, whether working in conjunction with existing online entities or on their own. That is not to say that we expect the growth of state virtual schools and online charter schools to slow—in fact all signs point towards continued overall growth in these sectors as well. However, we anticipate that the growth in online learning will increasingly move to the traditional central point of education for most students—their local school—and will take many forms from full-time online programs, to individual supplemental online courses, to courses that blend online and face-to-face components.

And what of transformation?

If the continued growth of online learning across the K-12 landscape now seems assured, what of the question of transformation? Will expanding online learning opportunities make a truly qualitative difference in American education over the long term?

We believe that the answer is yes, and further that online learning's relationship with education reform and innovation may turn out to be symbiotic rather than causal.

The growth of online options is occurring within an educational system that is undergoing other fundamental changes. Online learning can and should be a major component of each of these important reforms; in fact, each of these efforts both makes the case for and benefits from online education:

- The American Recovery and Reinvestment Act, otherwise known as the stimulus, is being used by the federal government to push for fundamental education reforms, particularly through the Race to the Top grants to states. Online learning advocates in a number of states have made their case for inclusion in the states' Race to the Top proposals, emphasizing the impact that online learning has demonstrated in promoting college readiness, improving availability of excellent teachers, and helping turn around low-performing schools through blended implementation, among others. The influx of large amounts of federal funding will likely spur significant additional online learning growth while deeply weaving online learning into states' focused reform efforts.
- Increasing the ways that data are used to drive education is an important priority of the stimulus that dovetails with a number of state initiatives already under way. Online learning provides an effective model for how data-driven instruction can work by generating objective and actionable data about every step of every lesson and how it advances student learning. Teachers in online environments are pioneers in using such data to make instructional decisions. Online learning will help drive improvement of state data systems and will benefit as student performance data become more granular, allowing linkages at the course level and beyond, and facilitating documentation of academic growth over time.
- Creating a national common core of academic standards is an effort rapidly gaining momentum among education leaders who recognize that the patchwork of state academic standards may be hindering reform and innovation. Online learning providers have long recognized the inefficiency of the current system, which prevents curriculum from benefiting students across state lines and undercuts the potential power of portability and scale in curriculum development. Online learning would clearly benefit from a common national approach to content standards and can provide a powerful template for how a common core approach allows improvement in both curriculum quality and accountability.

A cautionary note

Amid all the growth and transformative potential of online learning, we must sound a cautionary note. While in the past we were concerned that online learning practice was outpacing online learning policy, we are now equally concerned that purchasing practices are outpacing available measures of quality. This could lead to a situation in which online learning options are nearly ubiquitous but have no positive qualitative impact on American education.

The rapid growth of online learning has created immense pressure on administrators—from parents, policymakers, and the purse—to offer their students an online option, *any* online option. Besieged by vendors dangling deals almost too good to be true, these school leaders are equipped as consumers with rather simplistic selection criteria that may boil down to: Does the content align with state standards? Are teachers certified in my state? How much does it cost?

These are all questions that must be asked, but they are minimum considerations that do not go nearly deep enough to guide a thoughtful choice of an online course or program. State content standards are so basic as to be a banal topic within a field of innovation. Choosing an online course because it happens to check off all the boxes that match the terms required by state content standards does little to ensure that students will actually learn the key topics and ideas. Similarly, asking whether teachers are certified in a particular state mires the teaching profession in an outdated, place-based delivery mode. Does anyone really believe that a teacher who has been successful teaching Algebra to inner-city students in Los Angeles can't do the same in New York because she hasn't been certified in the new state?

The larger issue, however, is that it is easy for low-quality, low-cost providers to say that they meet state content standards and teacher certifications. For budget-strapped administrators who must answer to school boards, it may be difficult to look past these two questions to ask whether the content is imaginative and engaging, whether it meets the online learning standards created by iNACOL and SREB, and whether teachers are able to interact meaningfully with students. Furthermore, data systems that can measure true student outcomes for online learning are not yet in place, especially at the supplemental course level. As a result, critically important decisions about online learning resources are all too often being made largely on the basis of price, which can lead to poor results for individual schools and for education as a whole.

The next five years or so present a challenge to online learning practitioners because they represent a period when online options are ever more widely available, but neither the quality measures nor data are yet in place to fully evaluate those options. Online educators uniformly welcome the promise of data systems that fully evaluate individual student outcomes, which will allow for a flourishing of innovation guided by actual results. The challenge is creating the bridge to that time while preventing a “race to the bottom” driven by price competition at the expense of quality.

It will be up to the online learning community to ensure that this transitional period is marked by efforts to increase the savvy of online learning consumers while embracing voluntary standards of quality and accountability. To fail on either count will be to squander an epochal opportunity.

