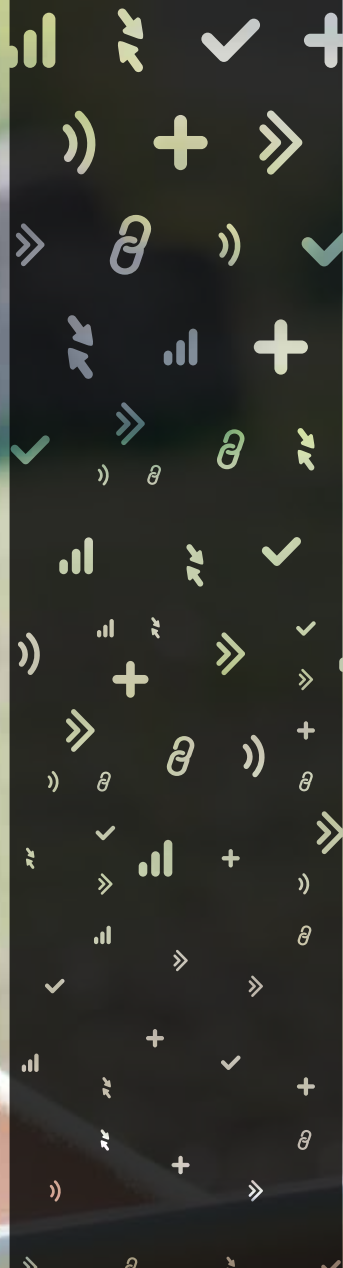


2013 TRENDS IN ONLINE LEARNING

VIRTUAL, BLENDED AND
FLIPPED CLASSROOMS

Blackboard K-12



Introduction

From small towns in North Carolina to metropolitan urban centers in California, the term “digital conversion” is becoming increasingly prevalent in school site and district office conversations about how to improve student achievement, enhance teacher effectiveness and stimulate new levels of parental engagement in schools. But what does this term really mean? For some leaders, a digital conversion may involve the replacement of print textbooks with online versions that allow students to leave the heavy textbook in the locker and access homework assignments from a tablet or laptop at home. Within some schools and districts, the implementation of a blended learning model where selected students direct their own learning part of the time using an online curriculum is their interpretation of a digital conversion. Still other leaders have taken the broader view and envision a digital conversion as a school or district wide transformation of the teaching and learning process that is accomplished through the effective and strategic mix of digital tools and resources such as fully online courses, high quality videos, social media and mobile devices. As discussed in the Speak Up 2012 National Report on the digital learning views of educators and parents, *“From Chalkboards to Tablets: The Digital Conversion of the K-12 Classroom,”* teachers are on the front lines of all of these digital conversions.

Each year since 2003, Project Tomorrow®, a national education nonprofit organization, facilitates the annual Speak Up National Research Project and, as part of this initiative, tracks the growing student, educator and parent interest in online learning, and how our nation’s schools and districts are addressing that interest with digital learning opportunities in and out of the classroom. The current national conversation about digital conversions sets the framework for this year’s discussion on the latest trends in online learning. Since 2007, Project Tomorrow has partnered with Blackboard Inc. to create a series of annual reports that focus on the year to year trends in the use of online learning to change the classroom learning paradigm through an in-depth analysis of the latest Speak Up national findings. In this latest update report, we examine the trends using an inside-out perspective on the classroom and the use of a variety of online learning strategies with students. In particular, we focus this year on the insights and experiences of four key stakeholders: administrators who have implemented online courses within their schools and districts, online learning teachers in virtual, blended or flipped classrooms, parents with personal online learning experiences, and the students who continue to be enamored with the potential of online learning to transform their educational experience.

This year’s key findings include:

- Administrators are widening their scope regarding the value of online classes to include learning opportunities for administrators, teachers and other support staff in addition to students.
- Virtual, blended and flipped learning teachers are using more digital content with their students than other teachers.
- Online learning teachers see significant value in the role of digital tools and resources to improve student success as well as their own personal productivity.
- Parents who have taken an online class for their own work or job training have high expectations for their child’s school to provide similar learning opportunities.
- Students are increasingly seeing online learning as a gateway to a new education paradigm where they are in control of the learning process.

Administrators' views on the role of online learning within a digital conversion

"I believe that the concepts of blended and flipped classrooms are necessary for the US to compete in a global society. These concepts improve student achievement by increasing student engagement, real life application, differentiation of instruction, and 21st century skill development."

SCHOOL ADMINISTRATOR, CANAL WINCHESTER LOCAL SCHOOL DISTRICT, OHIO

Today's administrators are increasingly interested in leveraging a wide range of technology tools and resources within their definitions of digital conversions, including many different implementations of online learning. In many ways, these new interest levels are being driven by a combination of factors internal to K-12 education as well as the external global economy. Whether state adopted or not, the Common Core State Standards are fundamentally changing the conversation about what learning looks like in our classrooms, and many education leaders are realizing the potential of online learning to help address those new standards. They see online learning not just as a platform for the delivery of instruction, but as highly efficient way for teachers and students to communicate, collaborate and connect around content. Administrators' own familiarity with online learning as part of their personal professional development tapestry is also changing their perspective on the value of this learning modality for their students. In addition, the lingering effects of the recession and tight school and district budgets are forcing many superintendents and school boards to re-think their assumptions about the role of technology

within learning. Rather than simply think of technology as an expense item, some innovative districts are starting to look for ways to leverage digital solutions to cut costs or to even increase district revenue such as with fee-based online summer school. The result of these various factors is the advent of a new spring for tapping into online learning tools and resources to transform the classroom experience.

One way to demonstrate this new interest in online learning is through the growth in the availability of online learning classes within a district, and the diversity of the stakeholders involved. As noted in Table 1, district leaders are increasingly seeing the value of online classes as an effective learning strategy for a diverse set of stakeholders including their administrative team, teachers, support staff and specific populations of students. The increase in the availability of such audience-specific courses in just one year, from 2011 to 2012, is an especially noteworthy statement on value.

As of fall 2012, 43 percent of district administrators say that they are now offering a variety of online courses to meet the needs of a diverse set of students. Only 16 percent of administrators say that they are not yet providing any online courses within their district.

"Utilizing technology in learning and teaching is crucial to our students learning! The amount of resources that are out there are amazing, and we are doing an injustice to our students by not having all the resources at their fingertips. These resources need to be available starting at the earliest of ages for each child individually."

SCHOOL ADMINISTRATOR, PLANO INDEPENDENT SCHOOL DISTRICT, TEXAS

TABLE 1: DISTRICT AUDIENCES FOR ONLINE CLASSES – GROWTH FROM 2011 TO 2012

	2011	2012	Growth
Administrators	24%	34%	42% increase
Teachers	29%	36%	24% increase
Support staff	8%	16%	100% increase

Given the pervasiveness of some level of online learning taking place within schools and districts nationwide, the views of those administrators who have implemented fully online courses, especially for students, is informative for understanding the path for a digital conversion. For example, when asked to comment on the best strategies for improving student outcomes, 53 percent of district administrators who have implemented online courses for their students identify effective use of emerging technologies such as online learning, digital textbooks and mobile devices as having the greatest potential. These same administrators also gravitate to solutions that are inherently enabled by digital tools and resources:

- **Integration of 21st century skill development into the curriculum (58 percent)**
- **Utilization of longitudinal data systems to track student learning (34 percent)**
- **Developing an individualized education plan for every student (30 percent)**

And this cohort of administrators have a different perspective on mobile learning as well. Over one-third of these administrators (38 percent) say that incorporating student owned devices into instruction is of interest to them today; only 26 percent of all other administrators share that same curiosity.

When asked to comment on the barriers that are standing in the way of expanding online learning within their schools, one quarter of school site administrators (26 percent) for the past two years have noted that finding teachers interested in

Online course: instruction is delivered primarily over the Internet either with teacher support or in a self-study mode

Blended learning: instruction is a mix of online and face-to-face with a teacher

Flipped learning: students watch videos of lectures or read content as homework, and class time is spent on project-based learning and personalized remediation

teaching an online course continues to be a challenge. Given the increasing interest on the part of students and parents for more online learning experiences, this situation presents a formidable obstacle to effectively leveraging online learning within a digital conversion. The views, values and behaviors of those teachers who are teaching online, either in fully online courses, in blended learning environments, or in flipped classrooms, can provide new insights to inform not only local digital conversion plans, but also to stimulate new approaches to teacher recruitment and capacity building for online learning.

Paving the road for digital conversions – meet the new online learning teacher!

“While the lessons online in my classroom are the same for every student in the class, the fact that they each work at a different pace allows me to personalize individual lessons for certain students, which would not be possible if the entire class was expected to maintain the same pace.”

TEACHER, LIFE SKILLS CENTER OF NORTHERN COLUMBUS, OHIO

The role of the teacher in the classroom is critical to any digital conversion. How that teacher leverages digital assets within instruction, facilitates the use of those assets by students, and enables the development of college and career ready skills during the process is at the heart of truly transformative teaching today. For the first time, we are able to examine three distinct cohorts of teachers that are on the front lines of this transformation process to provide us with rich new data on the emerging role of the teacher in an online learning environment. The three cohorts include: teachers that are teaching a fully online course, teachers that are teaching in a blended learning environment, and teachers that have implemented a flipped learning model within their classroom. In some instances, the teachers across all three cohorts share common perspectives or views on learning. In other cases, we see differences in their behaviors based upon their unique teaching model. Overall, teachers in all three groups demonstrate a distinctly more sophisticated understanding and use of technology within the learning process that can provide schools and districts with new benchmarks for evaluating the efficacy of their own digital conversions.

For this report, we examined the data from 56,346 teachers and librarians who submitted an online Speak Up survey in fall 2012. Within that sampling population, 3,051 teachers identified themselves as teaching one or more fully online courses, 28,856 teachers said they were teaching in a blended learning class, and 3,561 teachers have implemented a flipped classroom. Teachers across all grade bands are experimenting with these new teaching strategies as noted in Table 2, though the concentration of teachers who are teaching fully online courses or have flipped their classroom-teaching paradigm are primarily in high schools.

These online learning teachers are more likely to consider their technology skills to be advanced when compared to their peers. For example, 48 percent of teachers that have flipped their classroom see themselves as being more advanced than their peers, only 26 percent of all teachers label themselves as an advanced tech user. Teachers in all three cohorts are also experienced online learners. While 40 percent of teachers say they have taken an online class for their own professional development, 58 percent of teachers who teach a fully online class and 45 percent of blended learning teachers have experienced online learning as a student. Additionally, these online learning teachers are also more likely to be tapping into social media tools such as Twitter or online webinars to support their self-directed professional development. Twitter as a PD tool is currently being used by only one in ten teachers nationwide, but 18 percent of flipped learning teachers say they are regularly following experts online or tweeting about their own online learning experiences to support others. And 43 percent of virtual teachers see webinars and online video conferences as a key component of their professional development process; less than half of all other teachers (20 percent) are tapping into those collaborative resources yet.

Use of digital tools and resources by online learning teachers

“When my students use online resources such as Khan Academy videos to supplement my curriculum it gives them a chance to absorb the information at their own pace. Personalized learning such as this gives students a chance to rewind, pause and re-watch without holding up other students.”

TEACHER, MURRIETA VALLEY UNIFIED SCHOOL DISTRICT, CALIFORNIA

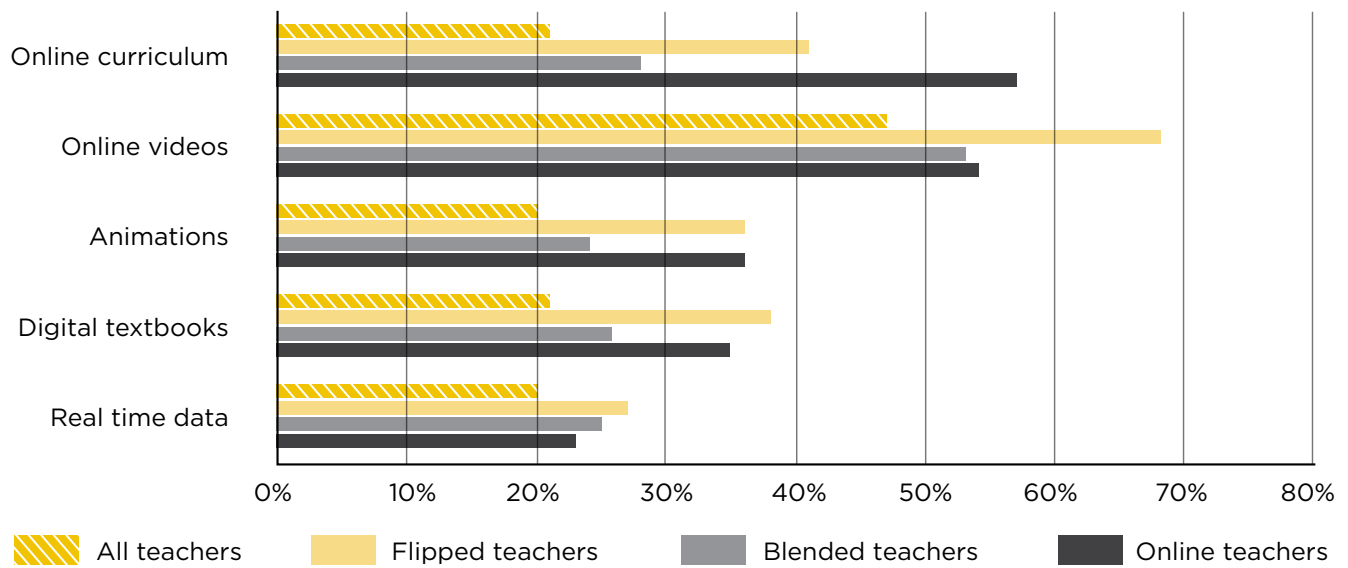
The increased personal usage of technology by virtual, blended and flipped learning teachers translates into their classroom usage as well. Chart 1 illustrates the usage of key digital content in the classroom by teachers. Across the board, all three cohorts of online learning teachers are using more digital content with their students than other teachers who are not involved any of the online learning models.

For many districts, the move from a print textbook to a digital textbook is the first step in their digital conversion. As noted here, teachers that have implemented a flipped learning classroom environment are not only more likely to be using online videos (68 percent) than other teachers (47 percent), but also more likely to be tapping into online textbooks (38 percent). While we would also anticipate that fully online teachers would be using an online curriculum (57 percent), we see that the use of digital content by teachers that teach in a blended classroom environment appears to be a balancing act of incorporating all of the identified digital content components. Given that blended learning is a mix of self-directed, self-paced online instruction with face-to-face or teacher led instruction, this balanced approach of using a diverse mix of digital content such as videos, animations, and real time data makes sense.

TABLE 2: GRADE LEVEL OF ASSIGNMENTS OF ONLINE, BLENDED AND FLIPPED LEARNING TEACHERS

Within the population of teachers who teach online:	I teach a fully online course	I teach in a blended learning environment	I teach in a flipped classroom
Elementary School	10%	34%	20%
Middle School	16%	23%	26%
High School	68%	35%	48%

CHART 1: TEACHERS' USAGE OF SELECTED DIGITAL CONTENT COMPONENTS IN THE CLASSROOM



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Beyond what tools the online learning teachers are using, their goals for using the technology also demonstrate a higher level of sophistication. Looking specifically at virtual teachers, this cohort is often twice as likely as all other teachers to use technology to facilitate student collaborations (45 percent vs. 24 percent), to track the relationship between student effort and achievement (29 percent vs. 12 percent) and to examine student performance trends to enhance new instructional strategies (51 percent vs. 33 percent). Correspondingly, the virtual teacher is less likely to identify a need for professional development as a barrier to their technology usage, but rather they see

school filters and firewalls (43 percent), district policies on technology usage in the classroom (36 percent) and limitations on social media use (24 percent) as challenges to their online teaching visions.

Evaluating the impact of online learning on student success and teacher effectiveness

“Being able to take classes online and electives at school would be more motivating and comfortable. It would encourage more students to do well academically. It would also teach students to be more independent.”

9TH GRADE GIRL, MERCED UNION HIGH SCHOOL DISTRICT, CALIFORNIA

The teachers in the virtual, blended and flipped learning classrooms are not only on the front lines of digital conversions in their schools and districts, but they are also pioneers in the research on the impact of online learning on their students' success as well as their own effectiveness as a teacher. When asked to identify the impact of their use of digital tools and resources on their students' performance, the teachers' perspective paints a new picture about the benefits of online learning that goes beyond the traditional views of scheduling convenience and college credits.



TABLE 3: TEACHERS' VIEWS ON THE IMPACT OF DIGITAL TOOLS AND RESOURCES ON STUDENTS' SUCCESS

	In the fully online class	In the blended learning class	In the flipped learning class
My students are more motivated to learn	56%	59%	60%
My students are developing creativity	52%	43%	57%
My students are developing problem solving and critical thinking skills	48%	36%	49%
My students are applying knowledge to practical problems	48%	34%	54%
My students are taking ownership of their learning	45%	32%	45%

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In light of the new Common Core State Standards, many of these value propositions around online learning stand as exemplars for how to effectively tap into technology to achieve the new learning paradigms mandated in the standards. For example, the ability for students to apply content and knowledge learned within instruction to real world problems is at the heart of many of the new standards. And yet only a quarter of teachers nationwide (27 percent) see technology as a way to meet those goals. Comparatively, twice as many flipped learning teachers (54 percent) say that they are already seeing that as a by product of their innovative use of online learning in the classroom.

As a first time participant in the concept of flipped classrooms, I have found that this allows me to challenge the students to stretch their learning while not getting bogged down with the process of mathematics. We have meaningful discussions on concepts and use much more collaboration. I am freed up to help those struggling while others can move ahead at their own pace. Although I have been teaching for 27 years, I love the idea of incorporating technology into my lessons. Whether it be phone apps, smartboards or graphing calculators, any tool that helps make math more relevant and accessible is a welcome addition to my class.

TEACHER, DAWSON-BRYANT LOCAL SCHOOL DISTRICT, OHIO



TABLE 4: TEACHERS' VIEWS ON THE IMPACT OF DIGITAL TOOLS AND RESOURCES ON THEIR PRODUCTIVITY

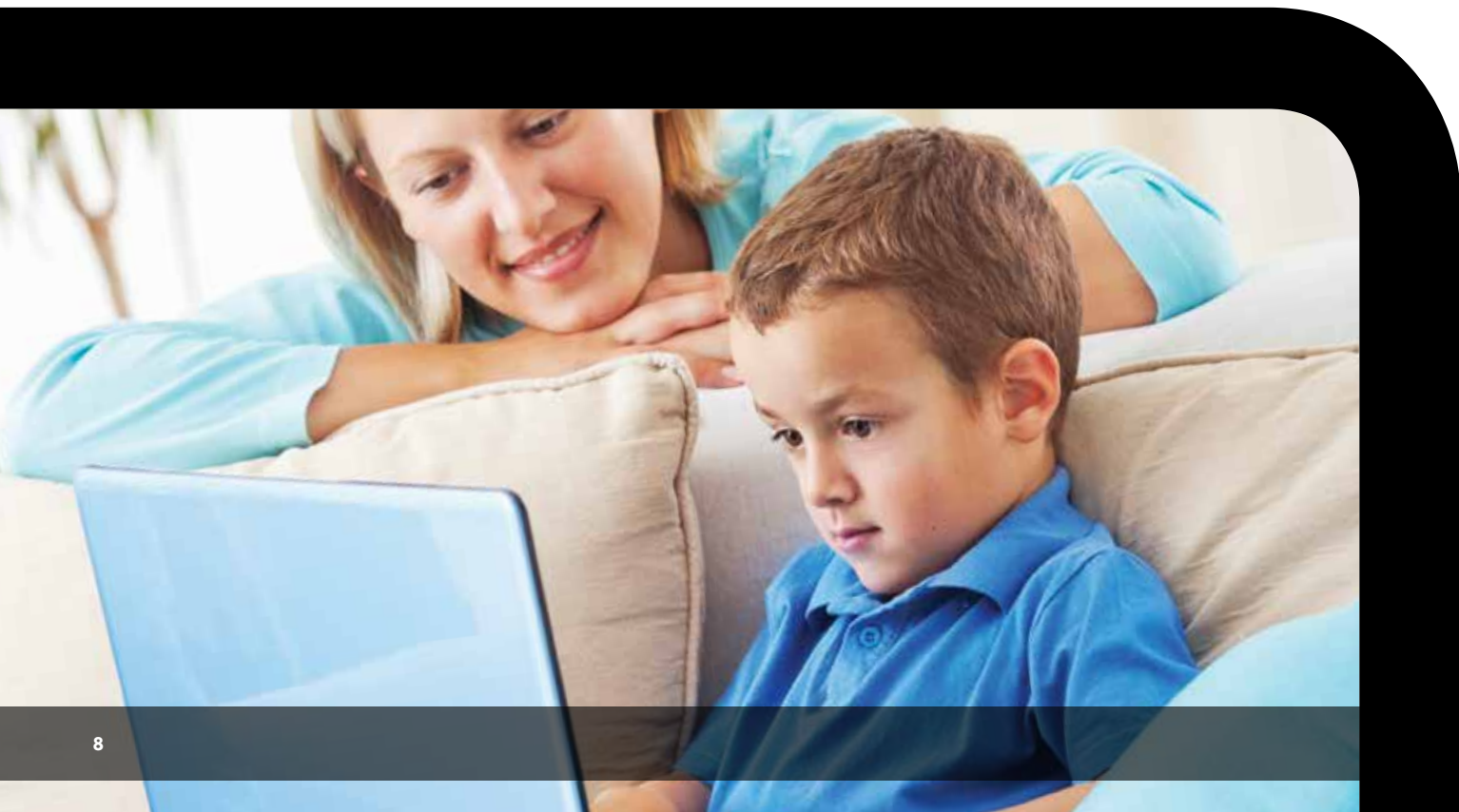
	In the fully online class	In the blended learning class	In the flipped learning class
I am better organized	65%	54%	63%
I am creating more interactive lessons	56%	51%	65%
I am facilitating more student centered learning	53%	40%	55%
I am more productive	49%	38%	50%
I am managing my class more effectively	47%	34%	46%
I am personalizing learning for my students	39%	23%	39%

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Given that 58 percent of school and district administrators link increased teacher effectiveness with improved student outcomes, the online learning teachers' perspective on the role of digital tools and resources on their own productivity is also significant. Following a similar trend as with student success, the teachers in the virtual, blended and flipped learning classrooms see their technology implementations as having a direct bearing on their own effectiveness.

In addition, the teachers in each cohort all note that their teaching approach has changed their relationship with their students. For example, 41 percent of fully online teachers say

that technology has allowed them to feel more connected to their students; only 22 percent of all teachers have had that same experience. Almost one-third of teachers in blended classrooms (30 percent) say that they are better able to assess what their students need as result of using digital tools and resources that support their increased productivity. And a majority of teachers in flipped classrooms (54 percent) note that their use of technology tools in the classroom results in students that are more self-directed, a goal that is also highly valued by the Common Core State Standards.



Driving the demand for increased online learning opportunities: parents' and students' expectations

Paralleling the trend of administrators and teachers taking online courses to support their professional development, parents are also gaining experience in online learning through their own work related or academic access to online courses. Over four of ten parents of school-aged children (43 percent) have taken an online course through their workplace or to support their job. An additional 29 percent have enrolled in an online course as part of a college or academic program. Where allowed, parents are even signing up for online traffic school (7 percent)! This increased first hand familiarity with the pros and cons of online learning has interesting ramifications for parents' perceptions around their child's school.

Parents' interest in the value of online learning is particularly acute for parents of high school aged children. While over a third of all parents (36 percent) wish that their child's school would make a larger investment in online classes, 48 percent of high school parents want more online courses available at their child's high school. Amongst these high school parents, 74 percent of them have taken an online course themselves and thus, their personal experience is a significant factor in driving this high interest level.

“My child’s school and district is in need of a great deal of improvement in fully utilizing the capacity of technology to enhance student achievement. The district must fully fund online learning during school, as well as in after school programs for students to complete curriculum assignments and pursue other academic interests. Every student should be assigned an online tutor who they may contact if they need additional assistance outside of the classroom.”

PARENT

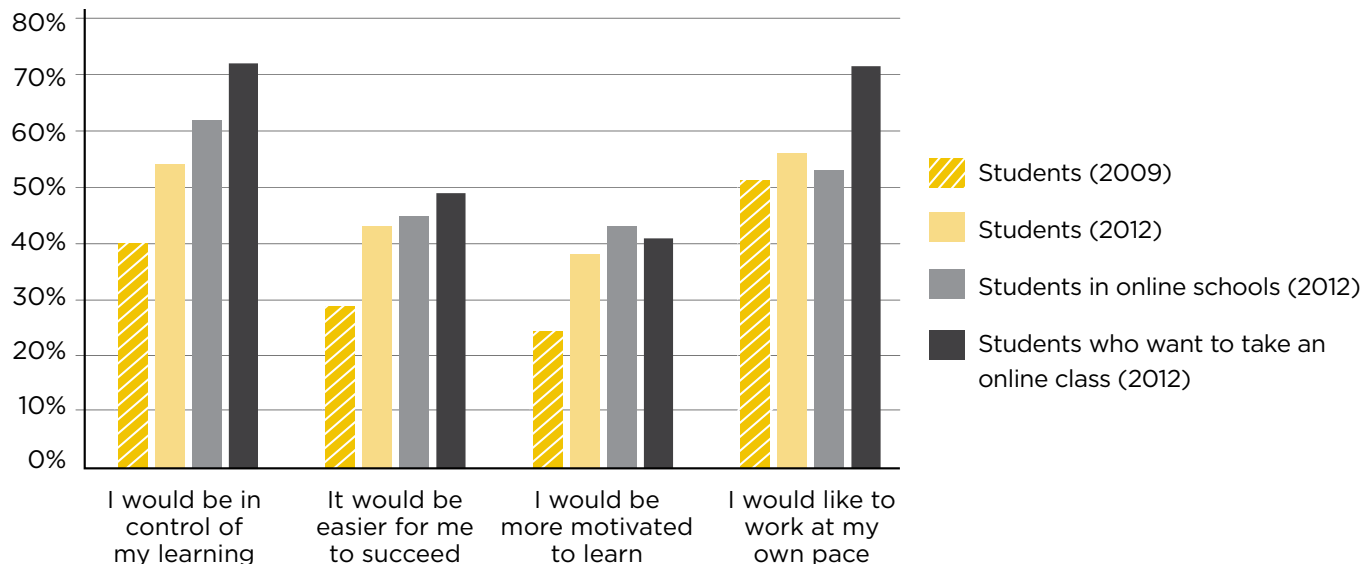
Parents that value online learning also have stronger opinions about the benefits of online learning for their child than other parents do. As noted in Table 5, the parents who would like to see greater district investments in online learning see strong value in online learning's capacities to enable personalized, self-paced learning. They also see the benefits of expanding course offerings for their child as a preparation for college.

Just as parents' views on online learning have evolved alongside their personal experiences with online classes, students' perspectives on the value of online learning have changed over time as well. This is especially true for students' assessment on the value of online courses to change or transform their learning experience. Chart 2 provides an interesting comparison on the views of four groups of high school students: students that took the survey in 2009, students that took in the survey in 2012, students who took the 2012 survey and are in an online school, and students who took the 2012 survey and would like to take an online class.

TABLE 5: PARENTS' VIEWS ON THE BENEFITS OF ONLINE CLASSES FOR THEIR CHILDREN

Benefits of online courses for students	Parents who want to see more online courses offered at school	All Parents
Ability to work at one's own pace	81%	62%
Ability to review materials as many as times as needed anywhere	78%	59%
Ability to take a class not offered at school	76%	51%
Ability to earn college credit	72%	43%

CHART 2: HIGH SCHOOL STUDENTS' CHANGING PERCEPTIONS ON THE BENEFITS OF ONLINE CLASSES – OVER TIME AND BASED UPON INTEREST AND EXPERIENCE WITH ONLINE LEARNING



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For students who have not yet taken an online class, their aspirations on the value of that experience in many cases exceeds those of students already enrolled in fully online schools. In general, students have a very high expectation on the value of online learning to transform their learning experience. With 41 percent of students in grades 6-12 and 26 percent of students in grades 3-5 already interested in taking an online class, today's students are in many ways functioning as a primary catalyst for digital conversions in our K-12 classrooms so as to satisfy their desires for more personalized, self-paced learning.

“I would stress the fact kids should be able to use whatever type of schooling best benefits them, whether it is in a standard school, home school, or school online. Some school districts make this difficult for students to be able to make that choice.”

10TH GRADE GIRL, GEORGIA VIRTUAL SCHOOL, GEORGIA

“I would encourage the exploration of hybrid classrooms whereby traditional whole group instruction is supplemented by individual and small group online learning that branches in the direction of students’ interests and achievement.”

SCHOOL ADMINISTRATOR, ARLINGTON COUNTY PUBLIC SCHOOLS, VIRGINIA

Ending thoughts

Project Tomorrow in collaboration with Blackboard provides these annual trends updates to stimulate innovative discussions around how to more effectively enable, engage and empower new online learning environments. In this year's update, we shared the latest Speak Up data with a particular focus on the role that online learning strategies can play within school and district digital conversions. With the impending implementation of the Common Core State Standards and other new standards, the timing is right to tap into the insights of key education stakeholders to explore both the benefits of online learning as well as how to leverage these tools and resources effectively to transform the learning experience. Additionally, as the online learning sector continues to expand and mature, it is especially valuable to tap into the experiences of actual online learners. This year's trends report provides some of those first hand insights from educators, parents and students who have been on the front lines with online learning. Their experiences can be the foundation on which to build a new vision for digital learning, a vision that brings together the best of online and face-to-face instruction and addresses the compelling environmental factors that are driving the momentum for digital conversions.

This discussion does not need to end here, however, and we encourage all readers to ponder the ideas and topics examined in this report and to think about the next steps that are necessary to transform K-12 education with online tools and resources. The following questions could be interesting conversation starters at your next school board meeting, professional development day, or even on the sidelines of a soccer game.

- **The K-12 education sector is abuzz with innovative new models for implementing online learning. Given that excitement and enthusiasm how can we ensure the academic quality and rigor of the learning experience for both students and teachers?**
- **Right now, both parents and students want more online learning opportunities from their schools. Yet, only 17 percent of teachers say they are interested in teaching an online class. Given that the current supply of online teachers is insufficient to meet this demand, what can district leaders and schools of education do to stimulate greater teacher interest in teaching online?**
- **As discussed, online learning plays a significant role in providing a solid foundation for digital conversions. However, scaling and sustaining the transformation of a school or district from a print-based culture to a digital culture ultimately requires greater investments of time, energy and capital. What is needed from either a policy or a funding perspective to build up the capacity of our educational institutions to move beyond pilot or classroom centric implementations of viral, blended and flipped learning to school or district wide transformations?**

Let's keep the conversation going!

“In my ultimate school, I would want laptops used in every class, online chat rooms for students to talk about what they are learning, online tutors, optional online classes for out-of-school subjects students are interested in, downloadable videos from demonstrations for students to study, and online content for students to study while they are on vacation or ill.”

6TH GRADE BOY, BLUE VALLEY SCHOOL DISTRICT, KANSAS

About the Speak Up National Research Project and Speak Up 2012

Speak Up is a national initiative of Project Tomorrow®, the nation's leading education nonprofit organization dedicated to the empowerment of student voices in education. Each year, the Speak Up National Research Project polls K-12 students, parents and educators about the role of technology for learning in and out of school. This survey represents the largest collection of authentic, unfiltered stakeholder voices on digital learning. Since fall 2003, over 3 million K-12 students, parents, teachers, librarians, principals, technology leaders and district administrators have shared their views and ideas through Speak Up. K-12 educators, higher education faculty, business and policy leaders report that they regularly use the Speak Up data to inform federal, state and local education programs.

In fall 2012, Project Tomorrow surveyed 364,240 K-12 students, 39,713 parents, 53,947 teachers, 2,399 librarians, 1,564 district administrators, 3,947 school administrators, and 500 technology leaders representing 8,020 public and private schools from 2,431 districts. Schools from urban (30 percent), suburban (27 percent) and rural (43 percent) communities are represented. Over one-half of the schools that participated in Speak Up 2012 are Title I eligible schools (an indicator of student population poverty). The Speak Up 2012 surveys were available online for input between October 3rd and December 21st 2012.

The Speak Up surveys included foundation questions about the use of technology for learning, 21st century skills and schools of the future, as well as emerging technologies (online learning, mobile devices and digital content), science instruction and STEM career exploration. In addition, educators shared the challenges they encounter integrating technology into classroom instruction, and how budget challenges have affected these decisions. The data is collected from a convenience sample; schools and districts self-select to participate and facilitate the survey-taking process for their students, educators and parents. Any school or school district in the United States is eligible to participate in Speak Up. In preparation for data analysis, the survey results are matched with school level demographic information, such as Title I status, school locale (urban, rural and suburban), and ethnicity selected from the Core of Common Data compiled by the National Center for Education Statistics (<http://nces.ed.gov/>). Speak Up data is cross-consulted with NCES statistics to ensure that data represent nation-wide school demographics. The data are analyzed using standard cross-tab analysis.

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About Project Tomorrow

Project Tomorrow® is the nation's leading education nonprofit organization dedicated to the empowerment of student voices in education. With 17 years of experience in the K-12 education sector, Project Tomorrow regularly provides consulting and research support about key trends in K-12 science, math and technology education to school districts, government agencies, business and higher education.

The Speak Up National Research Project annually polls K-12 students, parents and educators about the role of technology for learning in and out of school and represents the largest collection of authentic, unfiltered stakeholder voice on digital learning. Since 2003, over 3 million K-12 students, parents, teachers, librarians, principals, technology leaders and district administrators have shared their views and ideas through Speak Up. Learn more at tomorrow.org.

About Blackboard

Blackboard is a global leader in education technology that transforms the experience of millions of students and teachers every day. Blackboard works with states, K-12 districts and virtual schools to expand educational opportunities, create collaborative learning communities and increase engagement for students, teachers, parents and administrators. With Blackboard's website, online learning, mobile, and mass communication solutions, educators are closing the gap between the way students live and the way they learn through personalized, connected learning experiences that meet the needs of the K-12 classroom and the 21st century. Learn more at blackboard.com/k12.