

Thrive, Not Just Survive: Building Sustainable Online Programs Beyond OPMs

July 23, 2025

Dr. Andrea Carroll-Glover,
Vice President, Sr. Consultant, Ruffalo Noel Levitz

Dr. Jeremiah Grabowski,
Fractional Chief Online Learning Officer (COLO)



Today's Experts



- Dr. Andrea Carroll-Glover brings nearly 30 years of experience serving in higher education leadership, education technology, and business roles. As vice president and senior consultant, Andrea advises RNL partners on how to solve their biggest challenges by leveraging market insights and data-informed industry best practices to shape sustainable institutional strategies and practices. Expertise in Higher Education leadership, [Enrollment Management](#), [Fundraising](#), [Graduate & Online Education](#), Operations, Market Research, and Academic Program innovation.



- Dr. Jeremiah Grabowski Dr. Jeremiah Grabowski serves as a Fractional Chief Online Learning Officer (COLO), providing executive-level online strategy and leadership to institutions seeking digital transformation without the full-time executive price tag. He guides colleges in strategic planning, technology implementation, faculty development, operations, and revenue growth. Most recently, he served as Executive Dean of Online Learning and Faculty Development at D'Youville University in Buffalo, New York, where he led the expansion of online programs and the transition to in-house management. Dr. Grabowski holds a doctorate in Curriculum, Instruction, and the Science of Learning from the University at Buffalo and is recognized for his expertise in online education and faculty development.

Session Overview

In 2025, the **online education landscape is undergoing a significant transformation**, with institutions **increasingly shifting away from traditional Online Program Management (OPM) partnerships** towards **more flexible and customized solutions**. This evolution is driven by institutions' growing desire for control, cost-effectiveness, and the need to adapt to rapidly shifting market dynamics.

This session will explore cutting-edge trends in online program management and the experiences of institutions transitioning to new models, and incorporating the emergence of AI in online operations ecosystems. Three key themes include:

- Assessment and Decision Making
- Managing Change and Planning for the Future
- The Impact of Transitioning

Attendees will gain valuable insights into navigating the evolving OPM landscape and building sustainable, AI-enhanced online learning ecosystems that align with their institutional goals and values

Moving Beyond an OPM

Building Sustainable Models

- Continued demand for online learning
- Reliance on outsourced Online Program Management (OPM) declining
- Increased institutional experience
- Desire to leverage internal capacities and expertise
- Goal to create fiscally sustainable business models
- Increased shifts away from OPMs and creation of new online learning echo systems
- New models open opportunities for new partnership arrangements to address any uncovered gaps

Continued Online Education Demand



Source:

<https://www.forbes.com/sites/quora/2022/07/15/why-the-future-of-online-education-looks-bright/>

Headlines: Market and Regulatory Forces at Play

Start
here

October 09, 2018

Crowded OPM Market Begins to Consolidate

With its acquisition of Learning House, Wiley Education Services will become a much bigger player in the online program management space. Observers say the merger could be the first of many.

December 13, 2023

Future of OPMs in Flux as Regulations Loom

University relationships with online program managers could be turned on their heads in 2024, as the government considers more oversight into OPM contracts.

February 15, 2023

Oversight Coming for Online Program Providers

May 05, 2023

Moody's: Third-Party Servicer Guidance a Credit Risk for Institutions

Misrepresentations by OPMs could land colleges in trouble, Education Department says

Higher education institutions could lose access to financial aid or face penalties if their external service providers mislead students, new guidance says.

Published Jan. 16, 2025

October 11, 2023

OPMs on 'Life Support' in Changing Online Marketplace

December 13, 2023

Future of OPMs in Flux as Regulations Loom

University relationships with online program managers could be turned on their heads in 2024, as the government considers more oversight into OPM contracts.

April 22, 2024

Minnesota Lawmakers Push to Regulate OPMs

Online program managers that allow institutions to offer wide-scale online courses are under fire in Minnesota. Lawmakers don't like their profit-sharing model, among other things.

November 15, 2023

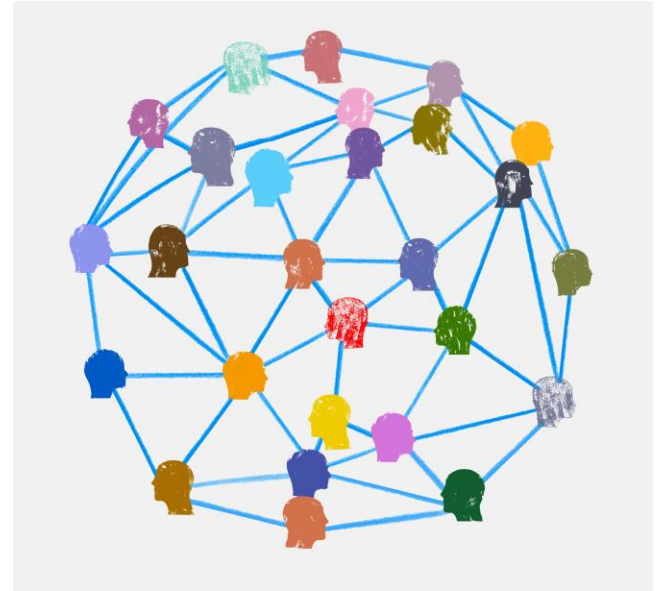
Merger of Online Program Companies Suggests 'Reset' in the Market

A background image showing a hand typing on a laptop keyboard, overlaid with a solid blue filter. The text is centered and reads:

Leaving and Opm and Buidling a New Model: A Few Considerations

It is Complicated

- Contractual Obligations
- Program Development Management
- Student Data and Systems
- Faculty Considerations
- Marketing and Recruitment
- Change Management



Navigating the Transition

Financial Implications

Leaving an OPM partnership can have significant financial consequences, including the need to invest in new personnel, technology, technology, and marketing resources. Institutions must carefully model the financial impact and develop a sustainable funding plan to support the transition.

Operational Considerations

The transition from an OPM partnership to an internally-managed or new partnership model requires careful planning and coordination to ensure seamless operations. This includes addressing issues such as student support, technology infrastructure, and the transfer of data and assets.

Reputational Risks

Institutions must also consider the potential reputational risks associated with leaving an OPM partnership, such as student and public perceptions. Proactive communication and transparent stakeholder engagement can help mitigate these risks maintain brand and reputation.

Regulatory Compliance

The transition may also require navigating complex regulatory and accreditation requirements, particularly related to online education. Institutions must ensure that their new online ecosystems fully comply with all relevant laws, regulations, and industry standards.

What Do You Need to Know?

Imagine you read your OPM was in trouble, you were not seeing desired performance results, or your state put forward new OPM regulations...
Would you know the answers to these questions?

1. Is the OPM delivering the results the institution needs?
2. Do you fully understand your contract?
3. Do you know how your OPM does what it does for you, so you could take on these processes yourself?
4. Do you know who owns what – your creative, your landing pages, your leads, your CRM, your LMS - so you can determine where you will start?
5. Do you know how much the OPM is spending on marketing your programs?
6. Do you have visibility into the “mechanics” of the digital marketing (and other tactics) being used to ensure money is being well-spent?



Managing Change and Building Capacity

Leadership and Change Management

Successful transitions from OPM partnerships require strong institutional leadership and robust change management expertise. Leaders must clearly communicate the rationale for change, engage key stakeholders, and provide the necessary resources and support to build new internal capabilities.

Developing Internal Expertise

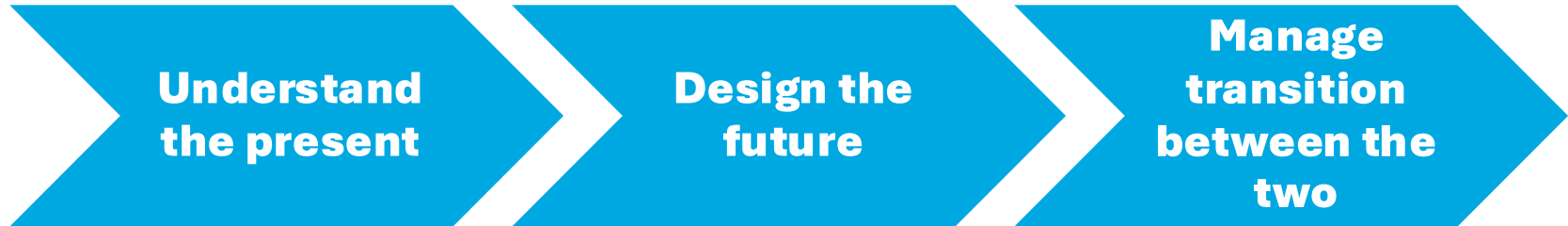
Institutions must invest in building their own in-house expertise in areas such as instructional design, online course development, marketing, and student support. This may involve hiring new talent, providing extensive training and professional development, and establishing dedicated teams or centers of excellence.

Establishing New Partnership Models

As institutions move away from full-service OPM partnerships, they can explore alternative fee-for-service models that provide targeted support in specific areas, such as marketing, enrollment management, or technology infrastructure. These partnerships should be designed to complement and enhance the institution's internal capabilities.

New Model: Change Management Framework

Helping leaders shift and replacing old ways of thinking and operating



Three-Step Process

Planning for Change



Leadership from the top with
a vision for the future state

Aligned with institutional mission



Understand the Present to
Guide Decision Making

Across existing operations across
functional areas

Assess and benchmark current operations
Identify potential gaps



Transition Planning and
Implementation

Scenario planning, financial assumptions,
staffing, our partnerships

Determine plan related to insourced vs.
outsourced elements

Calling a smart friend

Assessing Internal Strengths, Challenges, and Capacities

Honest Assessment	Framework	Leadership Buy-In	Shape Recommendations
Take an honest look Remove rose colored glasses	Leverage a framework and benchmark against best practices	Involve cross functional leaders to gain buy-in	Leverage insights to shape recommendations for future state



One Institution's Story

Case Study: One Institution's Experience



D'Youville University

Leaving an OPM Partnership

- Private, northeastern university
- Worked with an OPM
- Elected to leave the partnership to develop a new online program support model

Preface: The OPM landscape is shifting, and it is not my intention to cast OPMs or the decision to partner with them as good or bad. The purpose is to present neutral information senior-level leaders may want to consider when making decisions regarding their online strategy.



Chronological Milestones

Online Partnership Shifts Over Time

- **Initial OPM intentions**
 - Grow online enrollments
 - Break institutional processes, add structure, and infuse best practices
 - Support change management
- **OPM problems**
 - OPM acquisition/merger = less responsive partnership
 - Less alignment with mission/vision
- **Enrollment performance issues**
 - Sparked greater concerns and led to termination of partnership agreement
- **OPM divorce process**
 - Simultaneous planning and implementation and a new *insourced and outsourced model*

Why We Left the OPM: Performance

“It’s really about performance”

“...results for performance is enrollments”



Carroll-Glover, A. (2024). *Divorcing Your OPM: Moving from an Outsourced Online Program Management Model to a New Online Program Management Model: A Qualitative Descriptive Case Study* [Doctoral dissertation, Bethel University]. Spark Repository. <https://spark.bethel.edu/etd/1077>

All material in this presentation, including text and images, is the property of RNL. Permission is required to reproduce information.

Why We Left the OPM

Enrollment Shortcoming

● Enrollment Shortcoming

- -174 enrollments over 3 years
- Miss on enrollment performance by up to nearly -70% of goal
- Gross financial impact over 3 years \$2,325,225



Note: Source. Adobe stock (n.d.). https://districtadministration.com/wp-content/uploads/2022/06/Enrollment-decline-AdobeStock_220286415-scaled.jpeg

Carroll-Glover, A. (2024). *Divorcing Your OPM: Moving from an Outsourced Online Program Management Model to a New Online Program Management Model: A Qualitative Descriptive Case Study* [Doctoral dissertation, Bethel University]. Spark Repository. <https://spark.bethel.edu/etd/1077>

Why We Left the OPM

Additional Factors

- Partnership load for internal instructional design and development team assuming more responsibility
- Faculty preference to work with internal team vs. OPM team
- Student Perceptions of third-party representation and being bounced around when seeking support

Managing Change and Planning for the Future

Thoughtful and Change Management and Strong Leadership

- **Understanding the present**
 - Leverage and benchmarking against industry scorecards
- **Calling a Smart Friend**
 - Leverage outside expertise of a consultant to assess and understand current position
 - Determine enrollment funnel metrics and estimate digital marketing costs
 - Assessment underscored lack of marketing spend a key factor in why they were not succeeding
- **Financial Modeling and Scenario Planning**
 - Mapped a detailed transition and staffing plan
 - Included insourcing and outsourced elements

New Online Support Model

Blending an Insourced and Outsourced Model

Insourced	Outsourced
Admissions Advising Instructional Design	Marketing

Carroll-Glover, A. (2024). *Divorcing Your OPM: Moving from an Outsourced Online Program Management Model to a New Online Program Management Model: A Qualitative Descriptive Case Study* [Doctoral dissertation, Bethel University]. Spark Repository. <https://spark.bethel.edu/etd/1077>

Successful Transition

Before	After
<ul style="list-style-type: none">● Highest enrollment 150 students● Less than 12 programs● High degree of 3rd party control● Revenue share	<ul style="list-style-type: none">● 950+ enrollments● 20 programs● Increase institutional control● Strong student satisfaction● Increased academic innovation and quality● Increased University revenues and investments

Learnings and Insights

Helping University Leaders Considering Such a Journey

- **Leaving an OPM partnership is complicated**
 - Decisions vary over time
 - Initial OPM partnership beneficial and accelerated learning, but might be sustained
 - Doubt - Assessment and decision-making to support change case
 - Change - Planning and preparation across multiple departments
 - New model-Investment required
- **Enrollment, marketing and finances central to reason to terminate the OPM partnership**
- **Assessment and planning for future model**
 - Insource what you are good at (admissions, advising, instructional design)
 - Outsource areas where the university lacks expertise (marketing)

Recommendations

Considerations for Leaders Considering Such a Journey

1. Strong Leadership and Change Management Required
2. Assessment of Current State to Guide Decision-Making
3. Insource what you are good and outsource the rest
4. An Investment will be Required

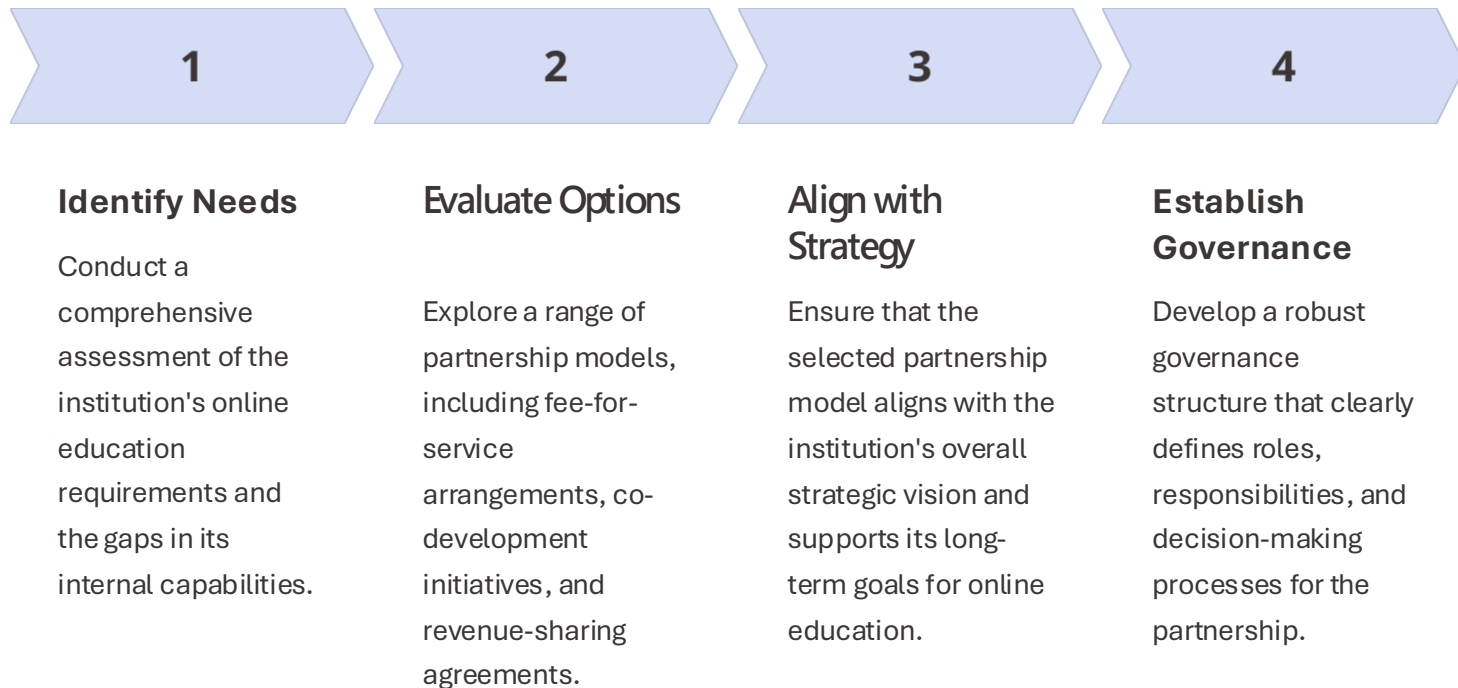
Carroll-Glover, A. (2024). *Divorcing Your OPM: Moving from an Outsourced Online Program Management Model to a New Online Program Management Model: A Qualitative Descriptive Case Study* [Doctoral dissertation, Bethel University]. Spark Repository. <https://spark.bethel.edu/etd/1077>

A background image showing a hand typing on a laptop keyboard, overlaid with a solid blue color. The text is centered in white.

Building a New Online Learning Support Model

Charting a Path to a New Model

Understanding Gaps and New Partner Options



Largest Gap in Leaving and OPM

Marketing and Recruitment

- OPMs often have extensive experience and resources in marketing and recruiting online students
- Universities ***may need to develop new marketing strategies and recruitment pipeline***
- This can take time and ***may lead to a decline in enrollment numbers in the short term***
- Often this is an area where ***campus chooses to outsource*** rather than insource
- Planning for such a transition and investment is an important aspect of an OPM transition

Measuring Success

Impact in a New Online Ecosystem

1 Enrollment and Retention

Track and analyze enrollment trends, conversion rates, and student retention to measure the overall health and impact of the online ecosystem.

3 Learning Outcomes and Impact

Measure the effectiveness of the online programs in terms of student learning outcomes, skill development, and career advancement.

2 Student Engagement and Satisfaction

Implement comprehensive feedback mechanisms to gather insights on the student experience and identify areas for improvement.

4 Operational Efficiency

Monitor the financial and operational efficiency of the online ecosystem, including cost-per-enrollment and return on investment.

Role of Artificial Intelligence

Pilot and Iterate

Start small, test thoroughly, and continuously refine your AI-powered solutions based on feedback and outcomes.

Upskill Faculty

Provide training and support to help instructors effectively leverage AI tools and mitigate potential risks.

Invest in Infrastructure

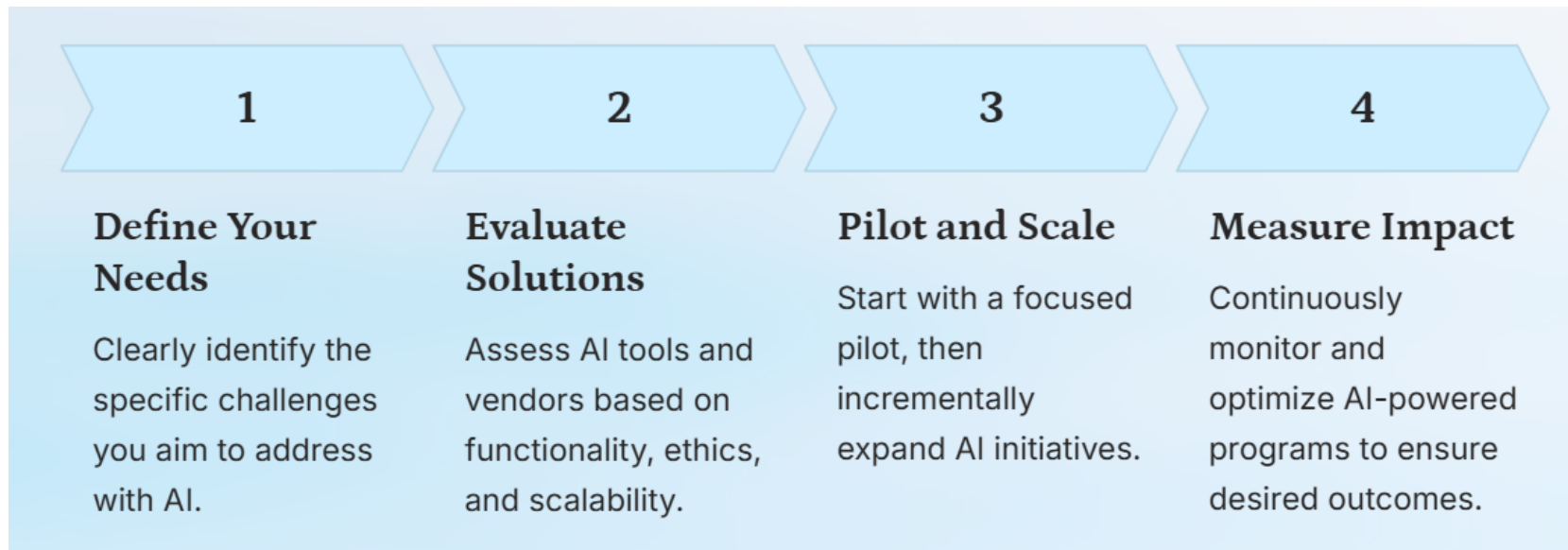
Ensure your institution has the necessary data, security, and technology foundations to support AI responsibly.

Collaborate Widely

Partner with experts, industry groups, and policymakers to stay ahead of emerging AI trends and best practices.

Practical Strategies and Use Cases

Leveraging AI to Build Capacity and Efficiencies



Potential for AI Impact

New Models Impacting the Future Online Experience

Enhance the Educational Experience	Boost Student Retention and Success	Adopt AI Ethically and Transparently
Personalize learning, automate grading, and provide 24/7 virtual support.	Identify at-risk students early, predict outcomes, and guide students' academic and career journeys.	Ensure fairness, empathy, accountability, and transparency in AI implementation.

Building a Thriving Online Ecosystem

A Process of Change Management



Collaborative Approach

Successful online learning ecosystems are built on a collaborative approach that engages faculty, staff, and students in the design, development, and delivery of online programs.



Innovative Technology

Leveraging cutting-edge educational technologies, such as adaptive learning platforms, virtual reality, and data analytics, can enhance the online learning experience and improve student outcomes.



Student-centric Focus

Placing the needs and experiences of online students at the center of the ecosystem ensures that the institution's online offerings are responsive, accessible, and tailored to their unique requirements.



Continuous Improvement

Regularly evaluating the performance and effectiveness of the online ecosystem, and continuously iterating and enhancing the offerings, is crucial for long-term success and sustainability.



Questions, Discussion

Keep the Conversation Going



Andrea Carroll-Glover, Ed.D.

Vice President and Sr. Consultant

Andrea-Carroll-Glover@RuffaloNL.com

[LinkedIn-AndreaCarroll-Glover](#)



Jeremiah Grabowski, Ph.D.

Fractional Chief Online Learning Officer

Jeremiah@FractionalCOLO.com

[LinkedIn-Jeremiah Grabowski](#)



The 39th Annual National Higher Education Conference