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Benchmarking Online Enterprises: Insights into Structures, Strategies, and Financial Models in Higher Education

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Executive Summary

As the online and professional education association, institutions often turn to UPCEA for answers to pragmatic questions around the structures, functions, finances, and policies of online education units. To provide its membership, and the field as a whole, with quantifiable and actionable data, UPCEA embarked on this study.

In total, 182 individuals participated in the study. The majority of respondents are employed at public research institutions and large institutions, with smaller representations from private, medium, and small institutions. Most respondents said that their online education units are housed in the provost's office, with others distributed across academic units or operating independently. Online program portfolios primarily include graduate degrees and certificates, along with microcredentials and undergraduate offerings. On average, the online units included in this study have a total budget of $8.6M and an average of 32 full-time employees that are funded by their unit. A minority of units use contracted services, mostly for marketing and recruiting. Respondents shared their primary strategies for remaining competitive in the online education market including focusing on program quality, leveraging brand strength, faculty expertise, and effective marketing and enrollment. A list of key findings based on the aggregate responses follows.

- On average, online units have **a total annual budget of $8.6M and a median of $3.5M.** This difference highlights variability in institutional budgets, indicating a range of budget sizes among institutions.

- Institutions have an average of **32 full-time employees who are funded by their online unit with a median of 15.** Also on average, there are **nine full-time employees who are funded outside of their online unit with a median of two.**

- **Forty-one percent of respondents' institutions' online education units reside in the provost's office,** 25% are nested within multiple academic units, and 17% are standalone units.

- When asked **which program types are included in their online unit's portfolio of programs that it supports, 84% said graduate degrees, followed by graduate credit-bearing certificates (80%),** microcredentials, non-degree or alternative credentials (71%), undergraduate degrees (68%), and undergraduate credit-bearing certificates (53%).

- **Only 29% of respondents have online units that use contracted services,** while 67% do not, and 4% were not sure. Among those who use contracted services, **71% use it for marketing,** followed by recruiting (61%), instructional design (39%), program development (36%), and student services (also 36%).

- To better position their online programs in a competitive environment, **85% of respondents' online units rely on program quality**, followed by brand strength (74%), faculty expertise (73%), and marketing and enrollment strategies (69%).

- **Forty-four percent of respondents strongly agree that their online unit has established strategies and efforts to ensure online programs are inclusive and accessible to a diverse student population**, while 40% agree, 11% neither agree nor disagree, and 5% disagree.

- **Over half (52%) of respondents are from public research institutions**, 18% from private research institutions, and 16% from master's comprehensive institutions. **Over half (53%) are from large institutions**, 33% from medium institutions, and 15% are from small institutions.

Throughout this report, these data are disaggregated and presented based on institution size. institution type, online unit location, and budget of the online enterprise. Similar to this executive summary, each of those sections is prefaced with Key Findings that provide highlights for that benchmarking parameter.

Research Objective

The objective of UPCEA's research was to collect benchmarking data on the structures, functions, finances, services, and policies of online education units.

Survey Methodology

The survey took place from April 8 to April 29, 2024. It was sent to UPCEA members designated as Chief Online Learning Officers (COLOs) and Institutional Representatives (IRs) as well as members of the Online Administration Network. Participants primarily represent public research institutions and large universities, with smaller representations from private, medium, and small institutions. One follow-up email was sent to non-participants. Overall, the survey was sent to 598 individuals, of whom 182 participated, 146 qualified, and 105 completed the entire survey.

Because most questions allowed for multiple responses, statistical significance testing across certain attributes could not be performed. This also inhibited the researchers' ability to conduct any inferential statistical analysis on this data.

As such, the researchers chose to conduct further analysis based on questions a consumer of this information might have:
- In general, how are online enterprises organized and resourced at postsecondary institutions?
- How are online enterprises organized and resourced, based on the size of the institution? (Small, Medium, Large)
- How are online enterprises organized and resourced based on the organization or mission of the institution? (Private Research, Public Research, Master's Comprehensive, Baccalaureate/Special Focus, Two-Year)
- How are online enterprises organized and resourced based on where the online enterprise is located at the institution? (Provost's Office, Stand Alone Unit, Nested Within Multiple Academic Units)
- How are online enterprises organized and resourced based on the budget of the online enterprise(s)? (Less than $1 million, $1 million to $3.49 million, $3.5 million to $7.5 million, and more than $7.5 million)

The research team believes that the analyses and reporting of data in aggregate and disaggregated along these four lines of inquiry will allow those interested in benchmarking their institutional online efforts with peers the greatest opportunity to do so.

Report Organization: Results & Analysis Categories

Responses are reported first in the aggregate followed by presentation and analysis based on four parameters: institution size, institution type, online unit location, and budget of the online enterprise. This allows those interested in benchmarking their institution and online enterprise the ability to do so by different attributes and perspectives. Additionally, select figures throughout the report have results presented as both median and average values, which facilitates more precise benchmarking, particularly when there is a large difference between average and median values. Definitions for each analysis parameter are as follows:

Institution size
- Small: fewer than 5,000 undergraduate and graduate students
- Medium: 5,000 to 15,000 undergraduate and graduate students
- Large: more than 15,000 undergraduate and graduate students

Institution Type
Based on UPCEA membership categories that are derived from Carnegie Classifications[1] and total enrollment per the Higher Education Directory[2] (UPCEA, 2024)
- Private Research Institution: Colleges and universities that conduct research and are privately funded through donations, endowments, and tuition
- Public Research Institutions: Colleges and universities that conduct research and receive significant funding from state governments or other public sources
- Master's Comprehensive Institutions: Institutions that generally award at least 50 master's degrees and fewer than 20 doctoral degrees during a given year, though there are exceptions
- Baccalaureate/ Special Focus Institutions: Institutions that have a more singular focus on an individual field (medicine, theology, etc.)
- Two Year Institutions: Institutions at which the highest level of degree awarded is primarily an associate degree

Online Unit Location
- Provost's Office
- Standalone Unit
- Nested Within Multiple Academic Units

Annual Budget
- Less than $1 million
- $1 million to $3.49 million
- $3.5 million to $7.5 million
- More than $7.5 million

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[1] https://carnegieclassifications.acenet.edu/
[2] https://ehes.hepinc.com/eHED/Login.aspx

Aggregate Results

Leadership and Strategy

Several items in the survey are not disaggregated by institution size, institution type, online enterprise location, and budget. These items focus on four areas:
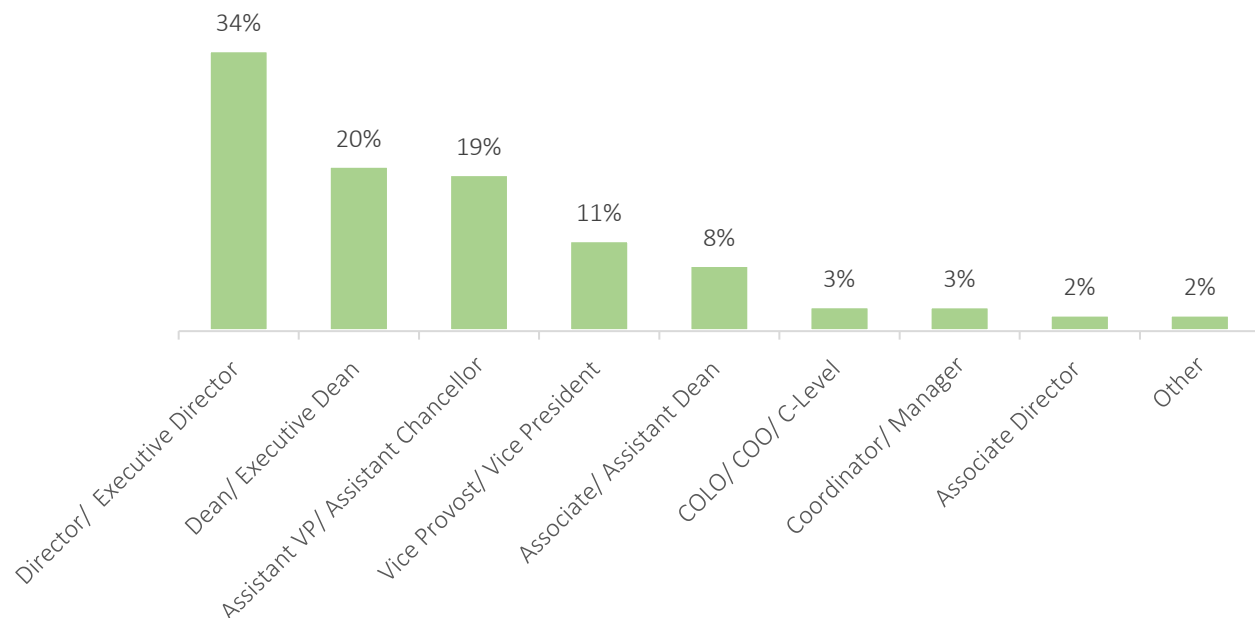- Chief Online Learning Officers (COLOs): Title, Reporting Relationship, and Involvement in strategy
- Learners: Inclusivity, Identify Verification, Individual Needs
- Competitive Environment: Differentiation of Offerings
- Policy Concerns

In all cases, these responses are contextual and largely indicative of institutional factors and individual Chief Online Learning Officers perspectives rather than nuances and differences observed in the benchmarking parameters. Further, the researchers would argue that many of these items are sector-wide trends rather than concerns of individual institutions.

Chief Online Learning Officers

Online unit leaders, commonly referred to as Chief Online Learning Officers (COLOs), hold various titles. Over a third (34%) of respondents are Directors/Executive Directors, 20% are Deans/Executive Deans, 19% are Assistant VPs/Assistant Chancellors, and 11% are Vice Provosts/Vice Presidents. Job titles mentioned fewer than three times were placed in the "Other" category which included President and Instructional Technology Specialist.

Figure 1: What is your title? (n=182)

Bar chart showing percentages by title:
- Director/ Executive Director: 34%
- Dean/ Executive Dean: 20%
- Assistant VP/ Assistant Chancellor: 19%
- Vice Provost/ Vice President: 11%
- Associate/ Assistant Dean: 8%
- COLO/ COO/ C-Level: 3%
- Coordinator/ Manager: 3%
- Associate Director: 2%
- Other: 2%

Over half (51%) of respondents said their COLO primarily reports to the Provost, while 10% said their COLO reports to the Dean of an academic unit, and 4% report to the institution's President. Thirty-six percent listed responses in the "Other" category.

Figure 2: Who does the Chief Online Learning Officer (COLO) primarily report to? If the COLO has multiple reporting lines, inclusive of dotted lines, please choose "Other" and describe the reporting relationships. (n=146)
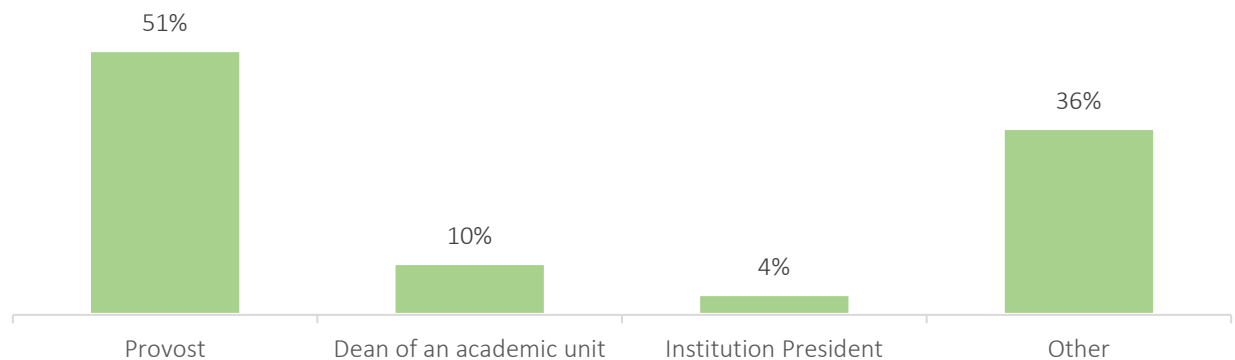
Over half (57%) of respondents are responsible for online leadership and strategy at the institutional level and 40% at the unit level. The 2% who are not responsible for online leadership and strategy at any level and the 1% who were not sure were terminated from the survey.

Figure 3: Are you responsible for online leadership and strategy at any of the following levels? (n=160)
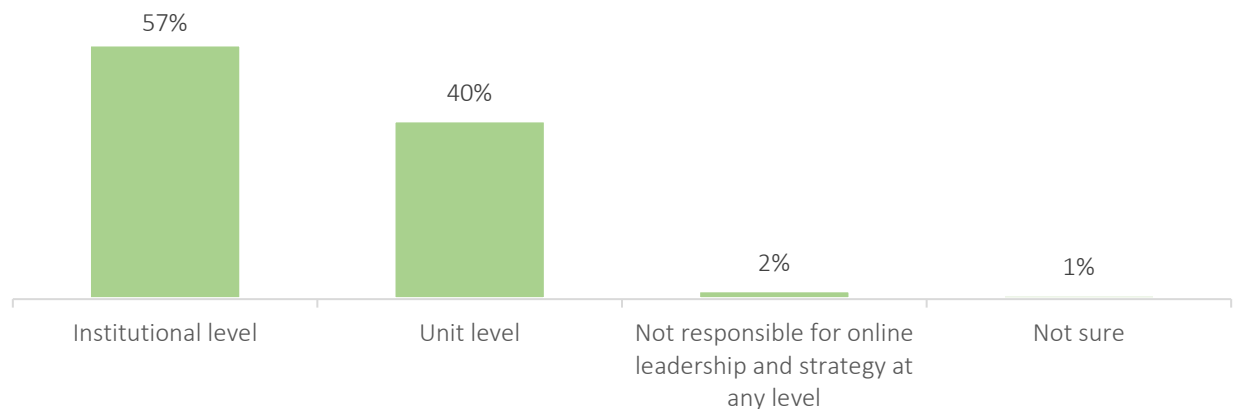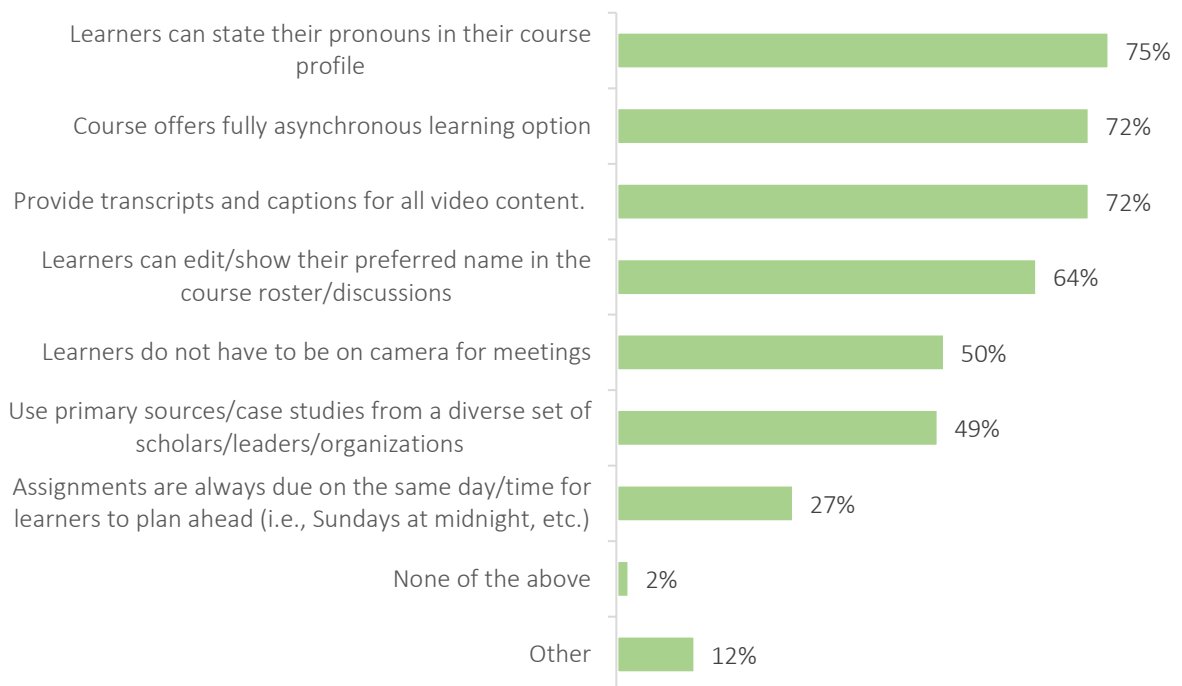
Focusing on Leaners

Forty-four percent of respondents strongly agree that their online units have strategies for inclusivity and accessibility, 40% agree, 11% neither agree nor disagree, and 5% disagree.

Figure 4: Please rate how strongly you agree or disagree with the following statement: My online unit has established strategies and efforts to ensure online programs are inclusive and accessible to a diverse student population. (n=105)

44%	40%	11%	5%

- ■ Strongly agree
- ■ Agree
- ■ Neither agree nor disagree
- ■ Disagree
- ■ Strongly disagree
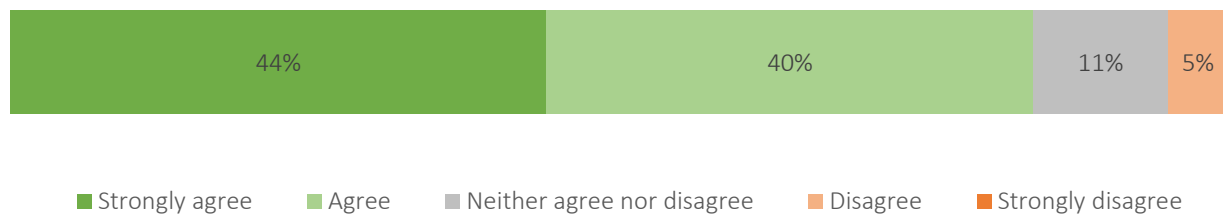
When asked which tactics their online enterprise uses with regard to diverse student identities and needs, three-quarters (75%) said learners can state their pronouns in their course profile, 72% said their courses offer fully asynchronous learning options, and 72% said they provide transcripts and captions for all video content.

Figure 5: Which of the tactics does your online enterprise use with regard to student identities and individual needs? Please select all that apply (n=105)

Tactic	Percent
Learners can state their pronouns in their course profile	75%
Course offers fully asynchronous learning option	72%
Provide transcripts and captions for all video content.	72%
Learners can edit/show their preferred name in the course roster/discussions	64%
Learners do not have to be on camera for meetings	50%
Use primary sources/case studies from a diverse set of scholars/leaders/organizations	49%
Assignments are always due on the same day/time for learners to plan ahead (i.e., Sundays at midnight, etc.)	27%
None of the above	2%
Other	12%

The Competitive Environment

To better position their online programs in a competitive environment, 85% of respondents' online units rely on program quality, followed by brand strength (74%), faculty expertise (73%), and marketing and enrollment strategies (69%).

Figure 6: Which of the following does your online unit use to better position its online programs in a competitive environment? Please select all that apply (n=105)
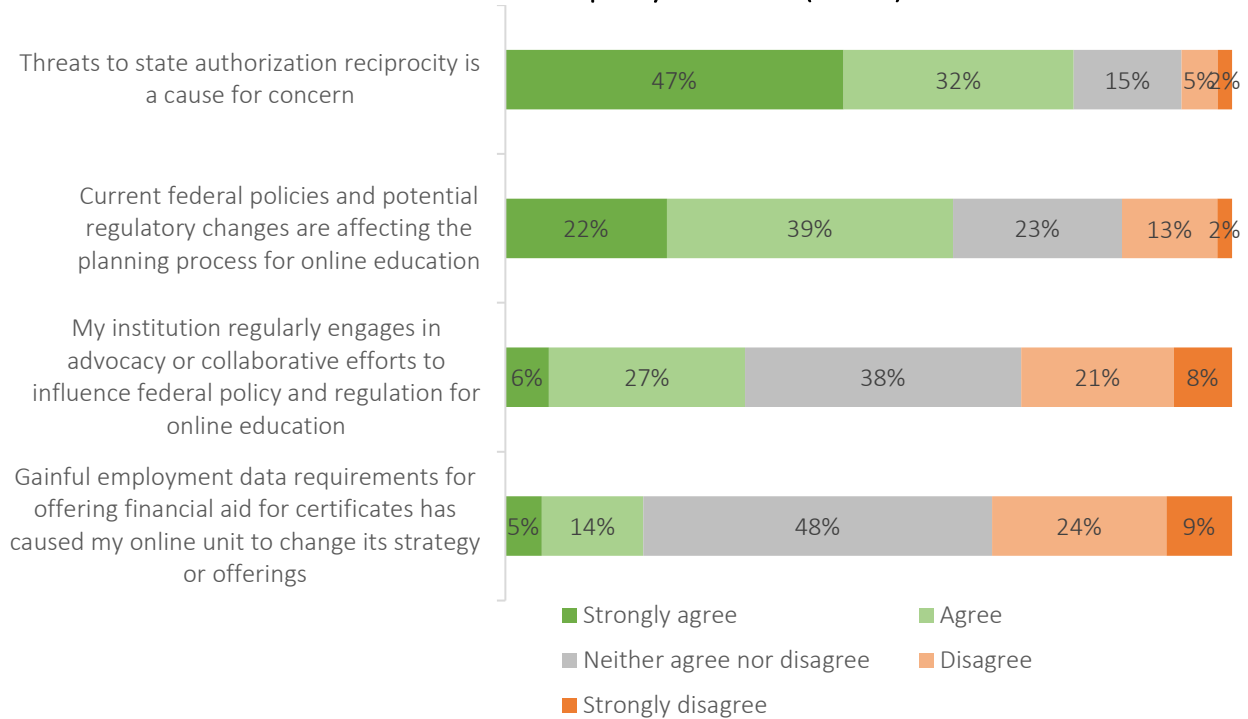
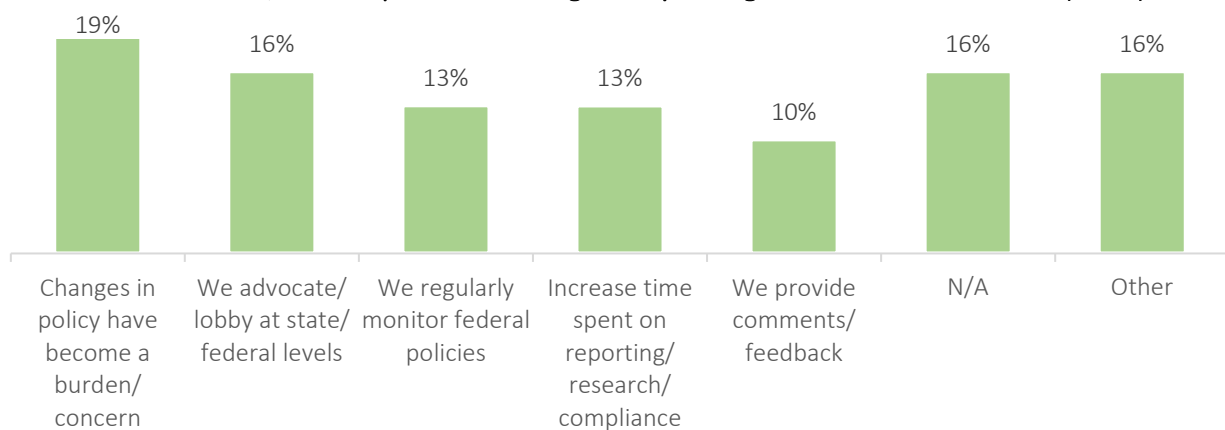|	
Program quality	85%
Brand strength	74%
Faculty expertise	73%
Marketing and enrollment strategies	69%
Affordable pricing vs. other institutions	54%
National rankings	46%
Professional certifications nested within programs	46%
Stackable credentials	43%
Access to job placement / career services	39%
Scholarships	36%
Coaching / Mentors	36%
Prior learning assessment / award of credit	34%
Generous credit transfer policies	27%
Lower pricing than in-person courses	9%
Other	11%
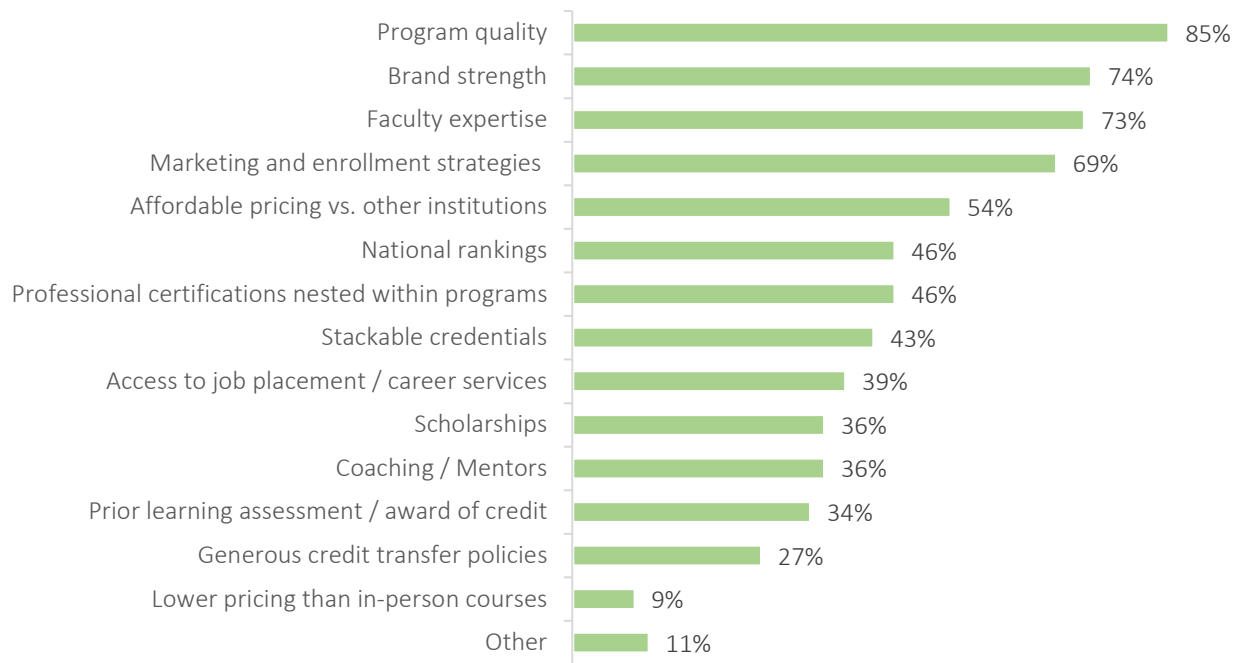
Policy

Seventy-nine percent of respondents strongly agree or agree that threats to state authorization reciprocity is a cause for concern, 61% strongly agree or agree that current federal policies and potential regulatory changes are affecting the planning process for online education, yet only 33% strongly agree or agree that their institution regularly engages in advocacy or collaborative efforts to influence federal policy and regulation for online education. A third (33%) disagree or strongly disagree that gainful employment data requirements for offering financial aid for certificates have caused their online unit to change its strategy or offerings.

Figure 7: Please rate how strongly you agree or disagree with the following statements regarding various US federal policy concerns. (n=107)

Statement	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Threats to state authorization reciprocity is a cause for concern	47%	32%	15%	5%	2%
Current federal policies and potential regulatory changes are affecting the planning process for online education	22%	39%	23%	13%	2%
My institution regularly engages in advocacy or collaborative efforts to influence federal policy and regulation for online education	6%	27%	38%	21%	8%
Gainful employment data requirements for offering financial aid for certificates has caused my online unit to change its strategy or offerings	5%	14%	48%	24%	9%

Legend: ■ Strongly agree ■ Agree ■ Neither agree nor disagree ■ Disagree ■ Strongly disagree

When asked to provide any additional information about how their unit is impacted by federal policies and regulatory changes, 19% mentioned that changes in policy have become a burden/concern, 16% say they advocate/lobby at the state or federal level, 13% regularly monitor federal policies, and 13% have increased time spent on reporting/researching/compliance.

Figure 8: Please provide any additional information about how your unit is impacted by, or advocates for, federal policies and regulatory changes in online education? (n=31)

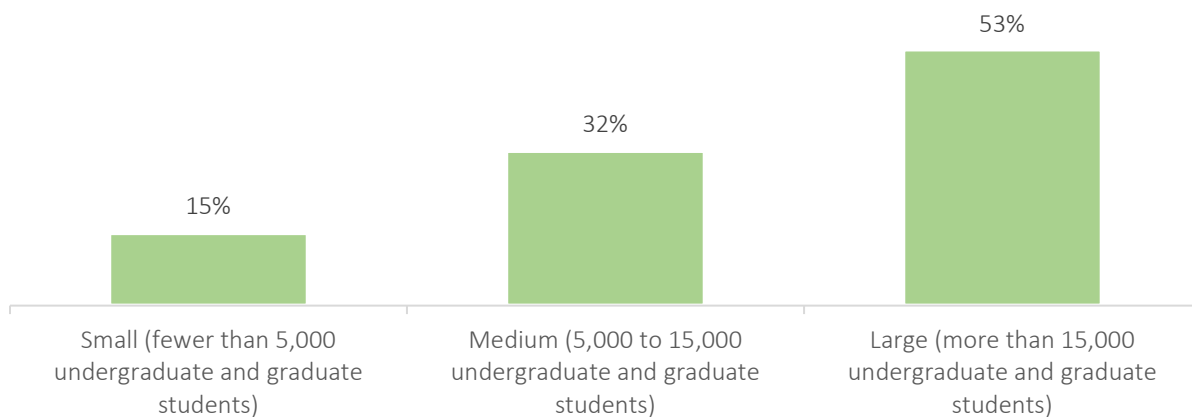| Category	Percentage
Changes in policy have become a burden/concern	19%
We advocate/lobby at state/federal levels	16%
We regularly monitor federal policies	13%
Increase time spent on reporting/research/compliance	13%
We provide comments/feedback	10%
N/A	16%
Other	16%

Benchmarking Parameters

As noted in the methodology section of this document, responses are reported first in the aggregate followed by presentation and analysis based on four benchmarking parameters: institution size. institution type, online unit location, and budget size of the online enterprise. This allows those interested in benchmarking their institution and online enterprise the ability to do it by different attributes and perspectives.

These results are presented in aggregate, followed by analysis based on institution size, institution type, location of the online enterprise, and annual budget of the online enterprise. Institutions should use these insights to benchmark their online education strategies and identify areas for improvement.

Institution Size

Over half (53%) of respondents are from large institutions, 33% from medium institutions, and 15% from small institutions. This is consistent with UPCEA's membership, in general.

Figure 9: Which of the following best describes your overall institution size for the 2022-2023 academic year? (n=182)

15%	32%	53%
Small (fewer than 5,000 undergraduate and graduate students)	Medium (5,000 to 15,000 undergraduate and graduate students)	Large (more than 15,000 undergraduate and graduate students)

Responses differentiated based on institution size bear further examination in this report, as large institutions, often seen as well-resourced in postsecondary education, may attribute some of their size to the online operations they support. Providing analysis by institution size will assist institutional leaders in benchmarking their online enterprise(s) and strategic directives around online learning, by peer set.

The analysis by institution size can be found later in the report, in the Institution Size: Responses and Analysis section of this document.

Institutional Type

Over half (52%) of the qualified respondents are from public research institutions, 18% from private research institutions, and 16% from master's comprehensive institutions.

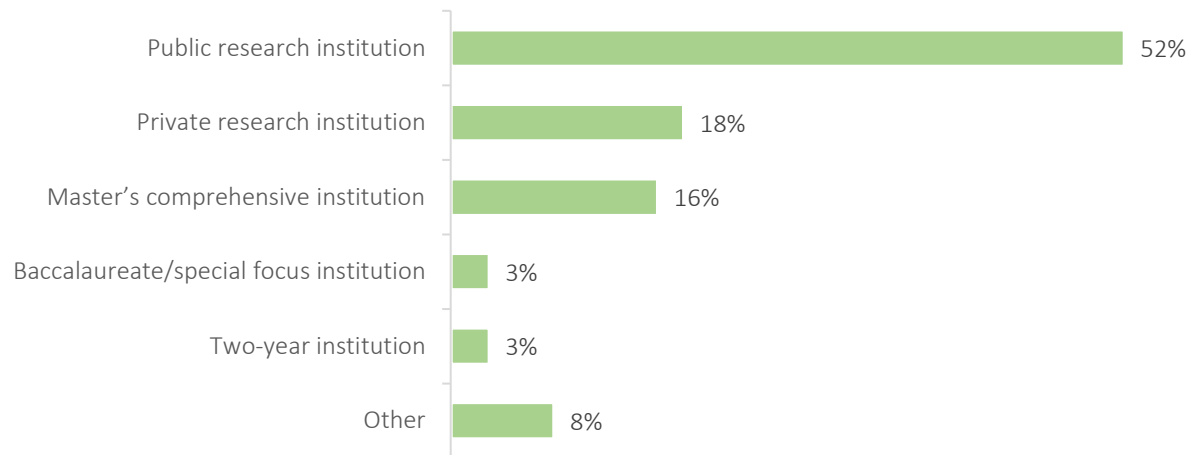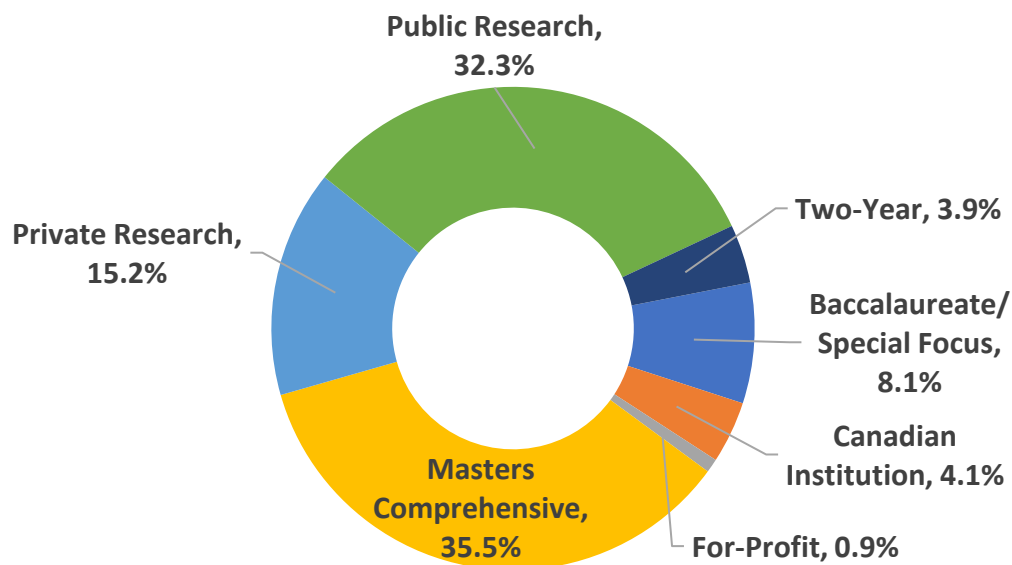**Figure 10: Institution Type (n=182)**

Institution Type	Percentage
Public research institution	52%
Private research institution	18%
Master's comprehensive institution	16%
Baccalaureate/special focus institution	3%
Two-year institution	3%
Other	8%

Figure 11 details UPCEA's institutional membership. It is important to note that it does not include system offices, non-North American institutions, or corporate and partner organizations.

Figure 11: UPCEA Member Institution Type (n=434)

- Public Research, 32.3%
- Private Research, 15.2%
- Masters Comprehensive, 35.5%
- For-Profit, 0.9%
- Canadian Institution, 4.1%
- Baccalaureate/Special Focus, 8.1%
- Two-Year, 3.9%

UPCEA's membership skews towards four-year institutions and public research institutions when compared to postsecondary institutions in the United States, overall.

Figure 12: NCES: Number of Degree-Granting Postsecondary Institutions (2022-2023)[3]
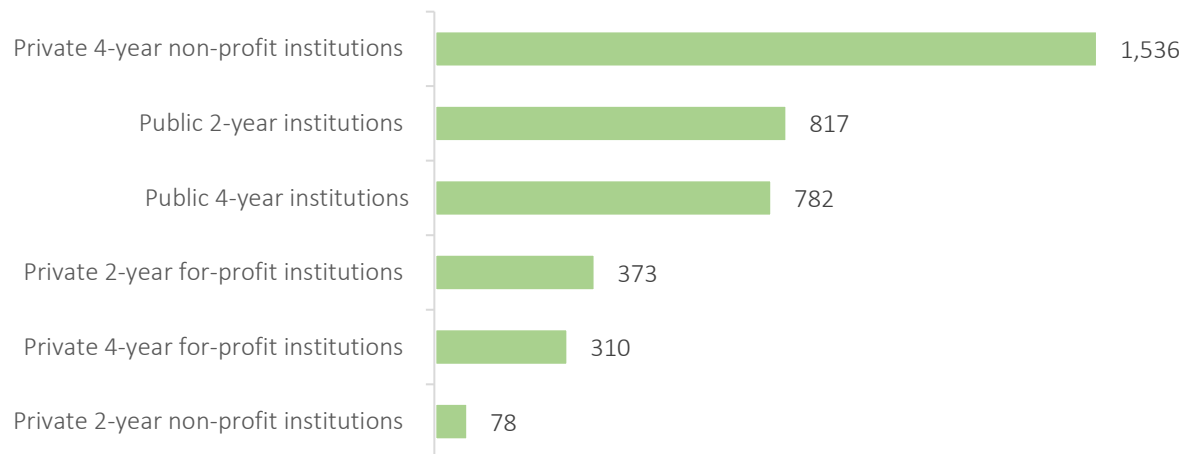
Institutional type is a key differentiator in the data analysis to follow, as research-intensive institutions, often termed 'flagship' institutions, have historically been slow to adopt online learning technologies and develop programs. For this reason, the researchers felt that institution type required further analysis and in doing so, would allow institutional leaders to benchmark their online operations against those of their peers, from a mission perspective.

The analysis by institution type can be found later, in the Institution Type: Responses and Analysis section.
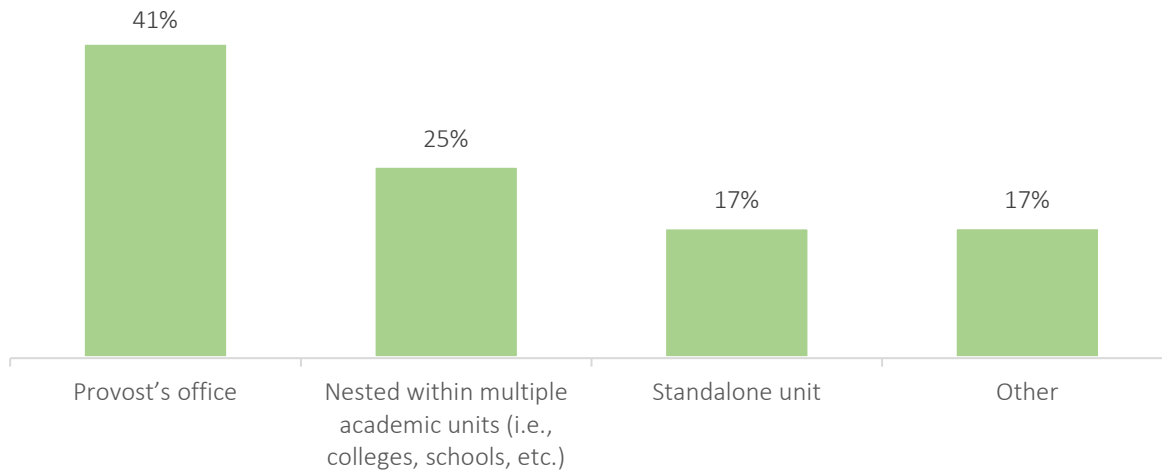
Location of Online Enterprises

Forty-one percent of respondents' institutions' online education units reside in the provost's office, 25% are nested within multiple academic units, and 17% are standalone units.

Because organizational information relevant to online enterprises is nuanced and lacks a data source to which the sample size might be compared, the researchers felt organization of online units was an important parameter by which institutional leaders might desire the opportunity to benchmark their institutions against their peers, having no other data on which to do so. Whether considering the current structure or an inspirational one (such as forming a standalone unit or establishing a unit within the Provost's office), those evaluating the strategic direction of their online efforts recognize that location and reporting signal support from the highest institutional levels. This data will help frame the benefits and disadvantages of various organizational scenarios.

The analysis by online enterprise location can be found later in the report, in the Unit Location: Responses and Analysis section.

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[3] https://nces.ed.gov/programs/digest/d23/tables/dt23_317.10.asp

Figure 13: Which of the following best describes where your institution's online education unit resides? (n=182)

The analysis by online enterprise location can be found in the Unit Location: Responses and Analysis section later in this report.

Online Enterprise Annual Budget

Twenty-four percent of respondents' units have an online unit total budget under $1M, 25% have a budget of $1M - $3.49M, 26% $3.5M - $7.5M, and 26% over $7.5M. On average, online units have a total budget of $8.6M and a median of $3.5M.

Figure 14: For the 2022-2023 academic year, what was your online unit's total budget? Please list the budget in USD.
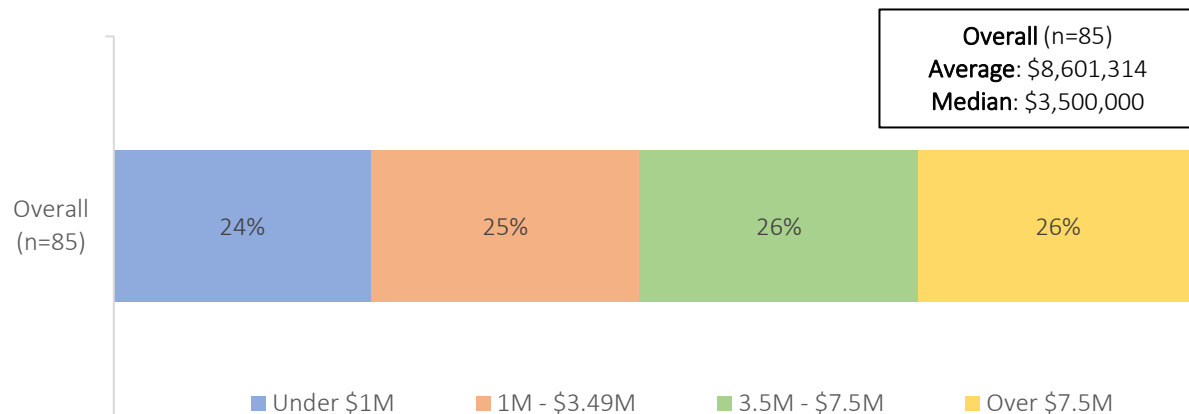
Similar to online enterprise location, the researchers felt organization of the annual budget of online enterprises was an important parameter by which institutional leaders might desire the opportunity to benchmark their institutions against their peers. While other surveys may ask

questions focused on budgets, using this survey item as a benchmarking parameter for other data points provides more opportunities for benchmarking. Further, it provides a more operational or tactical perspective, allowing for this data to be used for benchmarking at the unit level, exploring how an enterprise allocates its budget.

This data will help unit-level staff benchmark their operations based on budget dollars. The analysis by online enterprise annual budget can be found in the Online Enterprise Annual Budget: Responses and Analysis section later in this report.

Online Enterprise Attributes & Variables

The following survey items are disaggregated by the previously stated benchmarking parameters (institution size, institution type, online enterprise location, and online enterprise annual budget). In this section, each survey item is presented in aggregate, based on all responses received for that item.

Administrative and Academic Organization

To ensure survey respondents were working with a shared understanding of terms, UPCEA provided definitions for administratively decentralized and academically decentralized for academic and administrative operations associated with the online enterprise.

| Administratively Decentralized	Academically Decentralized
For the purpose of this research, administratively decentralized is defined as most administrative functions (e.g., enrollment management, student support, instructional design, etc.) occurring in individual academic units or in other university units, even those that are centralized, outside the online enterprise (e.g., University marketing)	For the purpose of this research, academically decentralized is defined as faculty, programs, and courses emanating from multiple academic departments or units for online programs.

Eighty-five percent of respondents strongly agree or agree that their online unit is academically decentralized, while nearly half (48%) strongly agree or agree that their online unit is administratively decentralized. Forty-five percent disagree or strongly disagree that their online unit is administratively decentralized.
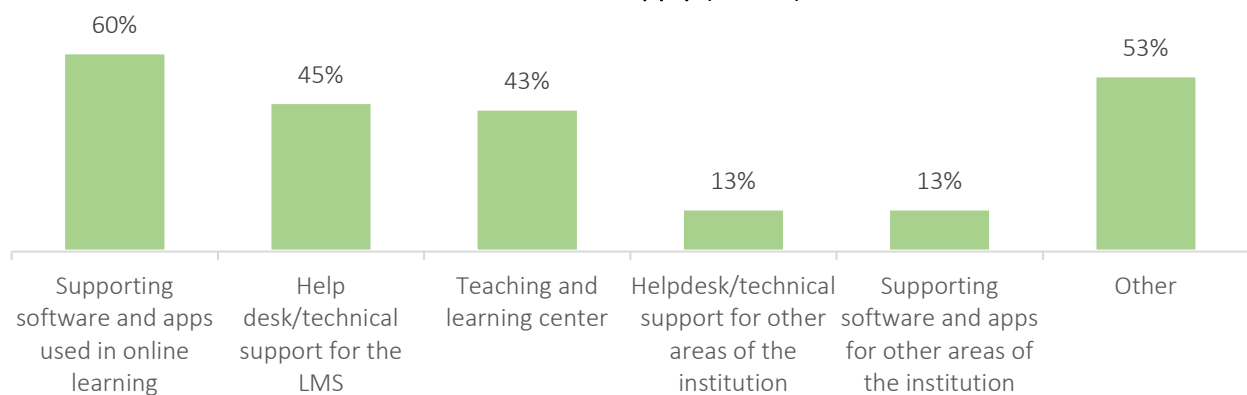
Figure 15: Please rate how strongly you agree or disagree with the following statements. (n=160)

|	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
My online unit is academically decentralized	53%	32%	6%	5%	5%
My online unit is administratively decentralized	29%	19%	8%	28%	17%
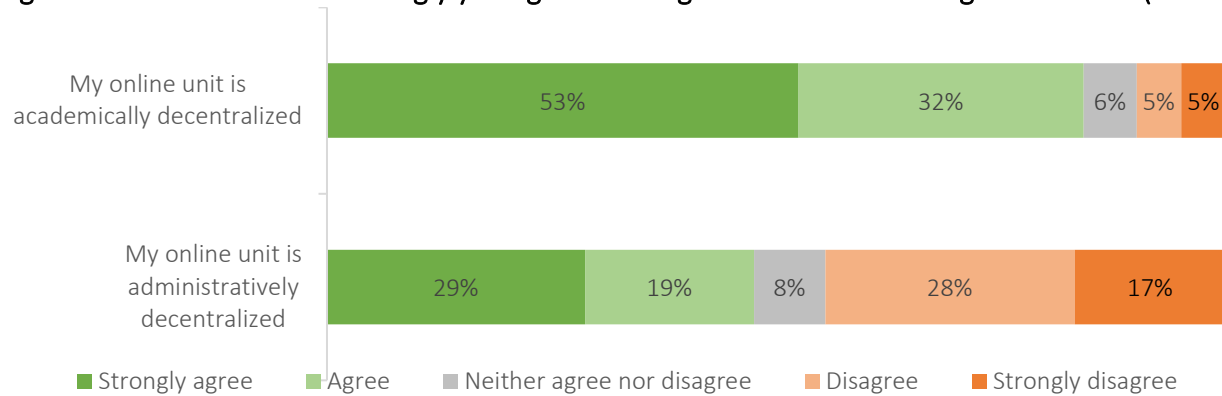
Services and Portfolio

Sixty percent of respondents said their online education unit is responsible for supporting software and apps used in online learning, followed by help desk/technical support for the LMS (45%), and the teaching and learning center (43%). Over half (53%) listed responsibilities in the "Other" category.

Figure 16: Which of the following are responsibilities for your online education unit? Please select all that apply (n=146)

|	
Supporting software and apps used in online learning	60%
Help desk/technical support for the LMS	45%
Teaching and learning center	43%
Helpdesk/technical support for other areas of the institution	13%
Supporting software and apps for other areas of the institution	13%
Other	53%

Among respondents who selected "Other" when asked about the responsibilities of their online education unit, 36% said their unit is responsible for instructional design/media, 26% project/program management, 23% recruitment/enrollment/admissions, and 23% said their online unit is responsible for marketing.

Figure 17: Which of the following are responsibilities for your online education unit? Please select all that apply (n=77)
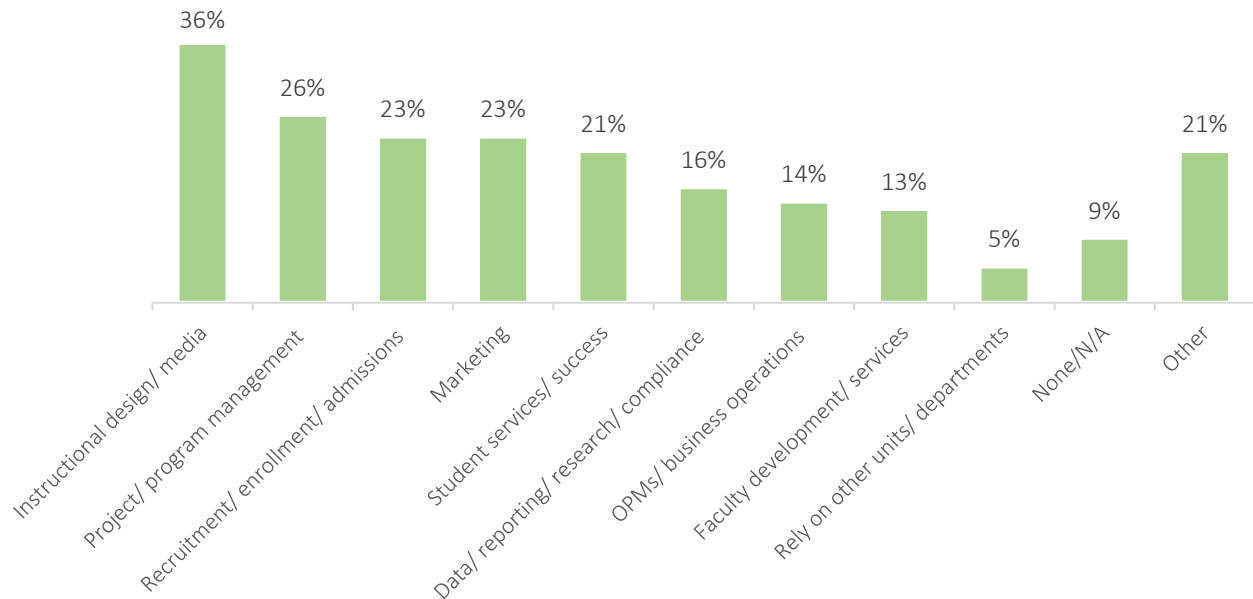
When asked which program types are included in their online unit's portfolio of programs that it supports, 84% said graduate degrees, followed by graduate credit-bearing certificates (80%), microcredentials, non-degree or alternative credentials (71%), undergraduate degrees (68%), and undergraduate credit-bearing certificates (53%).
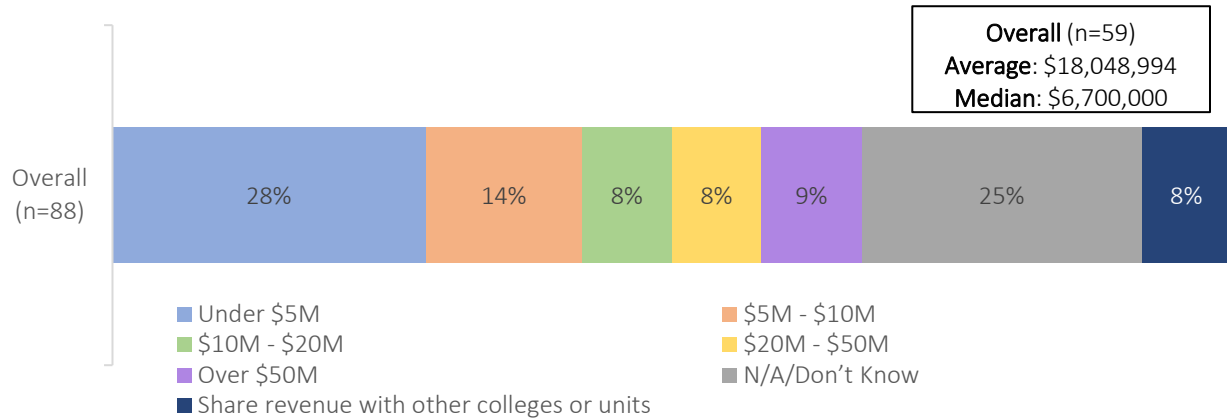
Figure 18: Which of the following program types are included in your online unit's portfolio of programs that it supports? Please select all that apply (n=146)
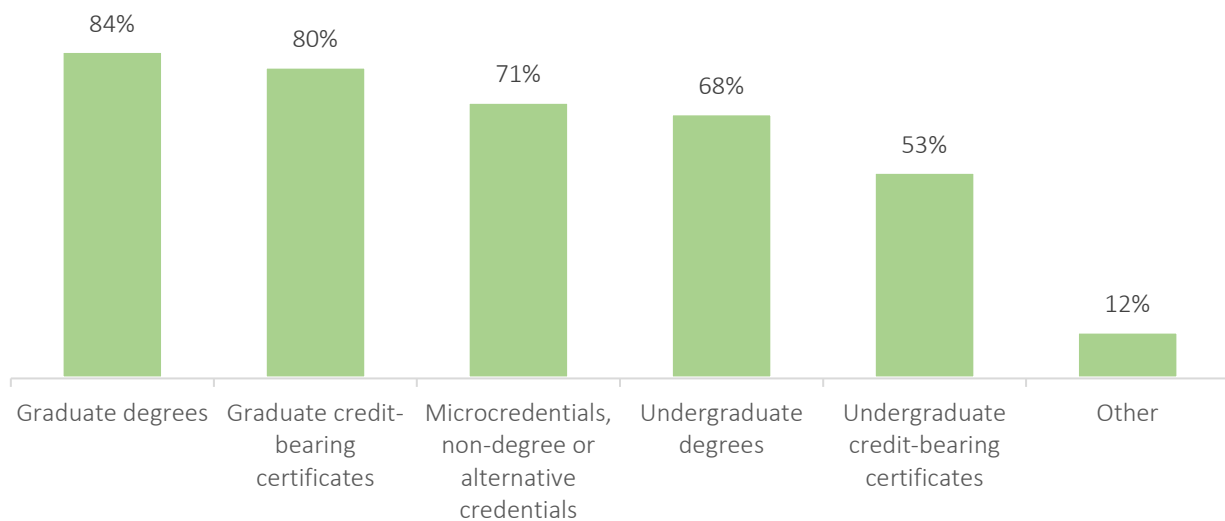
Revenue

For the 2022-2023 academic year, 28% of respondents' online units had a total gross revenue of under $5M, while 14% had between $5M and $10M. A quarter of respondents (25%) didn't know or put "N/A" for their total gross revenue. On average, the total gross revenue for online units was $18M with a median of $6.7M.
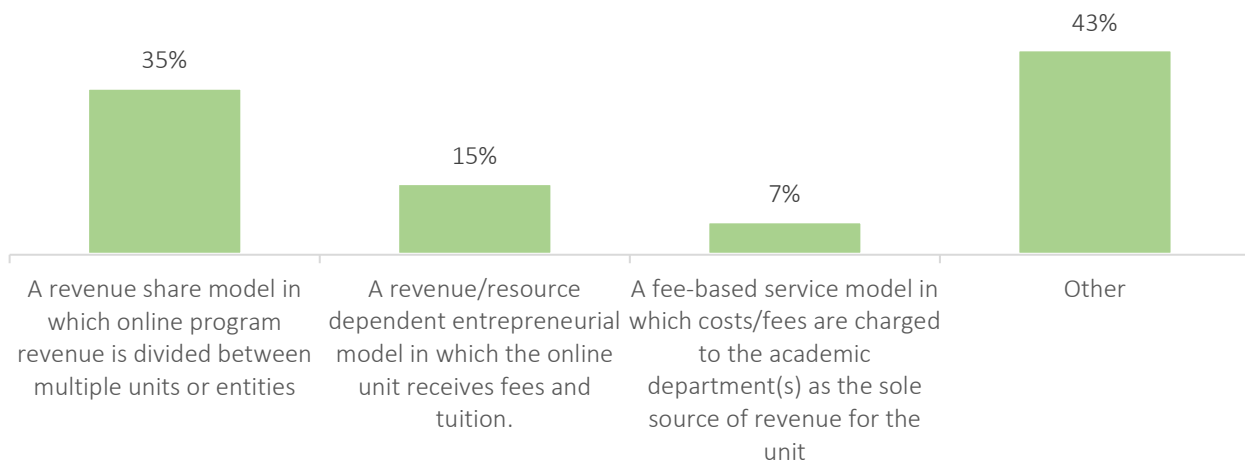
Figure 19: For the 2022-2023 academic year, what was your online unit's total *gross* revenue? Please list gross revenue in USD.

Overall (n=59)
Average: $18,048,994
Median: $6,700,000

Overall (n=88)

| 28% | 14% | 8% | 8% | 9% | 25% | 8% |

- Under $5M
- $5M - $10M
- $10M - $20M
- $20M - $50M
- Over $50M
- N/A/Don't Know
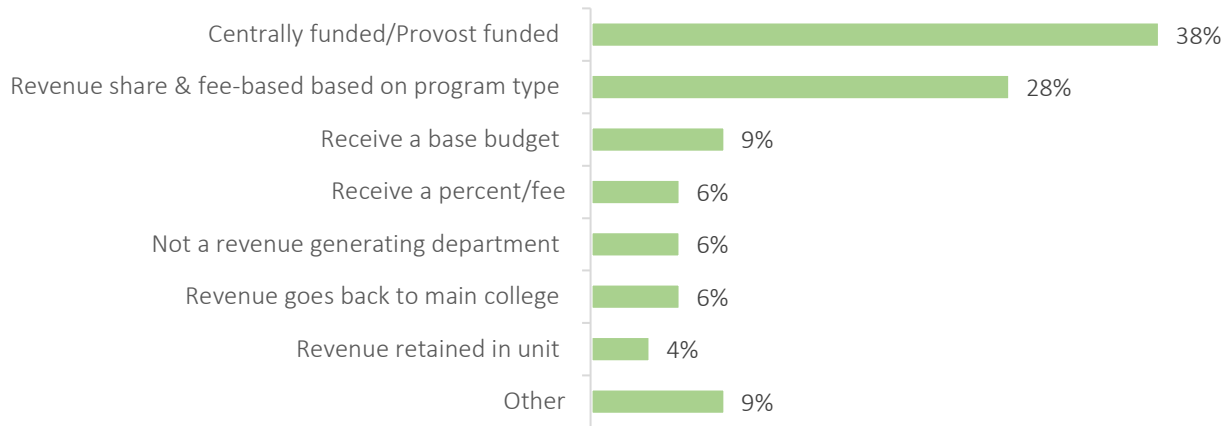- Share revenue with other colleges or units

Financial Models

Over a third (35%) of respondents' units have a revenue share model, 15% have a revenue/resource dependent entrepreneurial model, and 7% have a fee-based service model. Forty-three percent listed financial models in the "Other" category. Those responses are detailed in Figure 21. For respondents who selected "Other" the most common responses included the unit being centrally funded or funded by the provost office, or using revenue share and fee-based models based on programming.

Figure 20: Which of the following best describes your online unit's financial model? (n=109)

| 35% | 15% | 7% | 43% |

- A revenue share model in which online program revenue is divided between multiple units or entities
- A revenue/resource dependent entrepreneurial model in which the online unit receives fees and tuition.
- A fee-based service model in which costs/fees are charged to the academic department(s) as the sole source of revenue for the unit
- Other

Of the responses in the "Other" category, 38% of respondents said their unit is centrally funded/Provost funded which represents 16% of total responses., Another 28% of "Other" respondents said their unit uses revenue share and fee-based models based on the program type or 12% of total responses, and 9% receive a base budget.
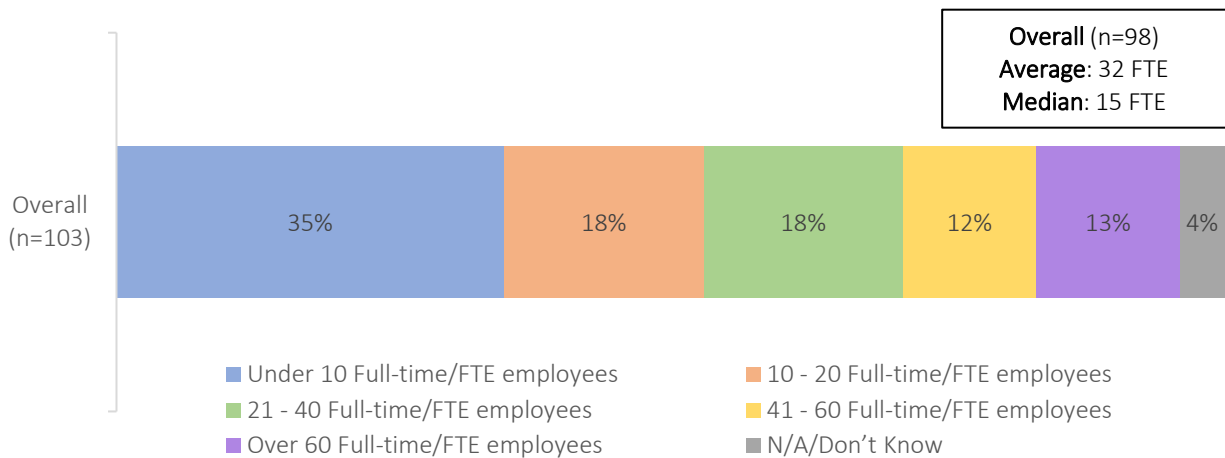
Figure 21: Which of the following best describes your online unit's financial model? (Other Responses) (n=47)

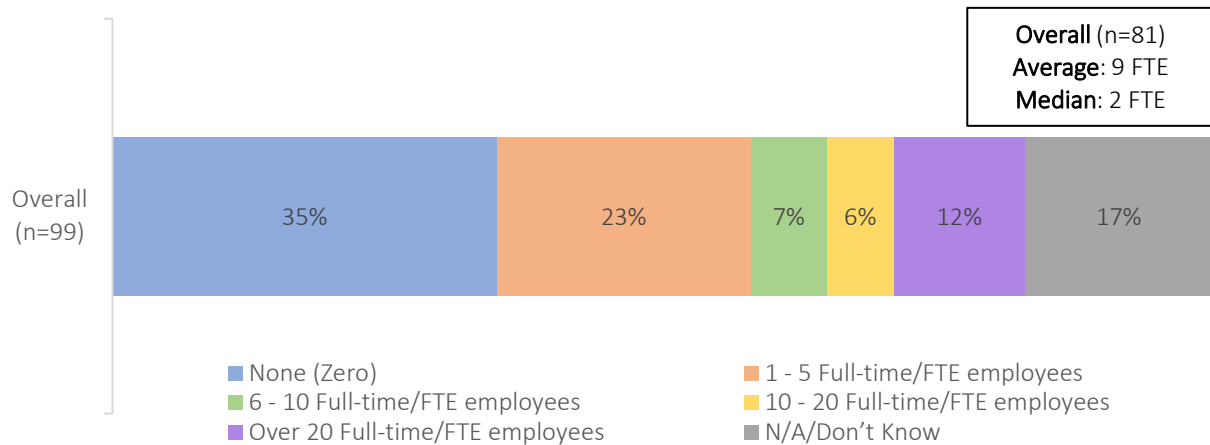|	
Centrally funded/Provost funded	38%
Revenue share & fee-based based on program type	28%
Receive a base budget	9%
Receive a percent/fee	6%
Not a revenue generating department	6%
Revenue goes back to main college	6%
Revenue retained in unit	4%
Other	9%

Staffing

Over one-third (35%) have under 10 full-time or full-time equivalent (FTE) employees who are funded by their online unit, 18% have 10-20 full-time or FTE employees, and an additional 18% have 21-40. On average, respondents have 32 full-time employees funded by their online unit with a median of 15.

Figure 22: Including yourself, how many full-time or full-time equivalent (FTE) employees (i.e., two half-time employees equal one full-time employee) are funded by your online unit?

Overall (n=98)
Average: 32 FTE
Median: 15 FTE

Overall (n=103)

35%	18%	18%	12%	13%	4%

- Under 10 Full-time/FTE employees
- 10 - 20 Full-time/FTE employees
- 21 - 40 Full-time/FTE employees
- 41 - 60 Full-time/FTE employees
- Over 60 Full-time/FTE employees
- N/A/Don't Know

Figure 23: How many full-time or full-time equivalent (FTE) employees that are involved in online learning but are funded outside of the online unit's budget?

Overall (n=99)

| 35% | 23% | 7% | 6% | 12% | 17% |

Overall (n=81)
Average: 9 FTE
Median: 2 FTE

- ■ None (Zero)
- ■ 1 - 5 Full-time/FTE employees
- ■ 6 - 10 Full-time/FTE employees
- ■ 10 - 20 Full-time/FTE employees
- ■ Over 20 Full-time/FTE employees
- ■ N/A/Don't Know

Instructional Design

Participants were asked about the instructional design model their online model employs, and over half (52%) said they have an online unit that supports the institution's centralized instructional design team, 18% leverage a centralized instructional design team located elsewhere on campus, and 7% leverage instructional design teams from other academic units. 37% of responses listed in instructional design models in the "Other" category are detailed in Figure 25.

Figure 24: What is the instructional design model that your online unit employs for the development of online programs? Please select all that apply (n=108)

| 52% | 18% | 7% | 37% |

Our online unit supports the institution's centralized instructional design team | Our online unit leverages a centralized instructional design team located elsewhere on campus | Our online unit leverages instructional design teams from other academic units | Other
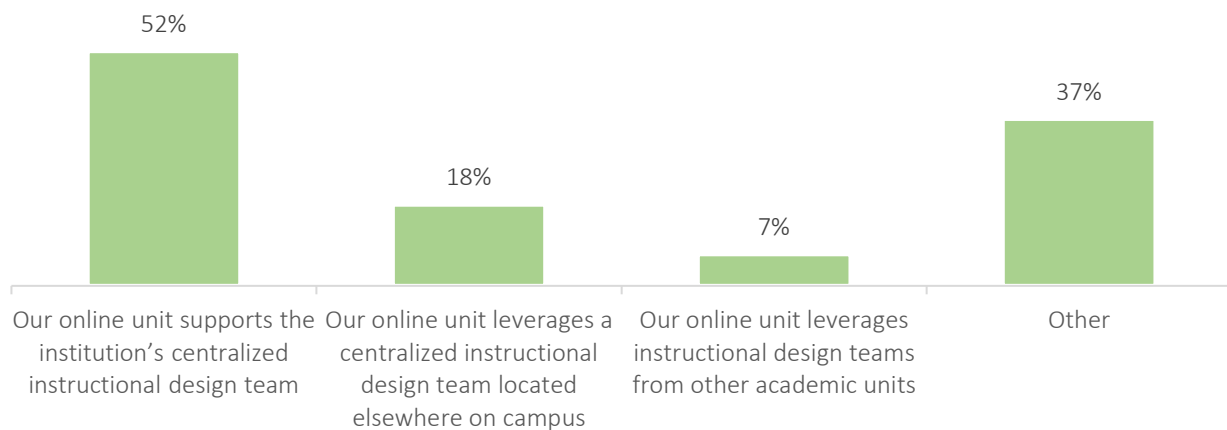
Among respondents who selected "Other," 55% said that they have their own internal instruction design (ID) unit, which represents 20% of the total. Another 23% outsourced ID services (9% of total), 18% leveraged ID services from other units/departments (7% of total), and 10% (4% of total) said they use internal unit and external ID services.

Figure 25: What is the instructional design model that your online unit employs for the development of online programs? Please select all that apply. (Other Responses) (n=40)

55%	23%	18%	10%	3%
We have our own internal instructional design (ID) team/unit	We outsource ID services	We leverage ID services from other units/departments	We use internal unit & external ID services	Other
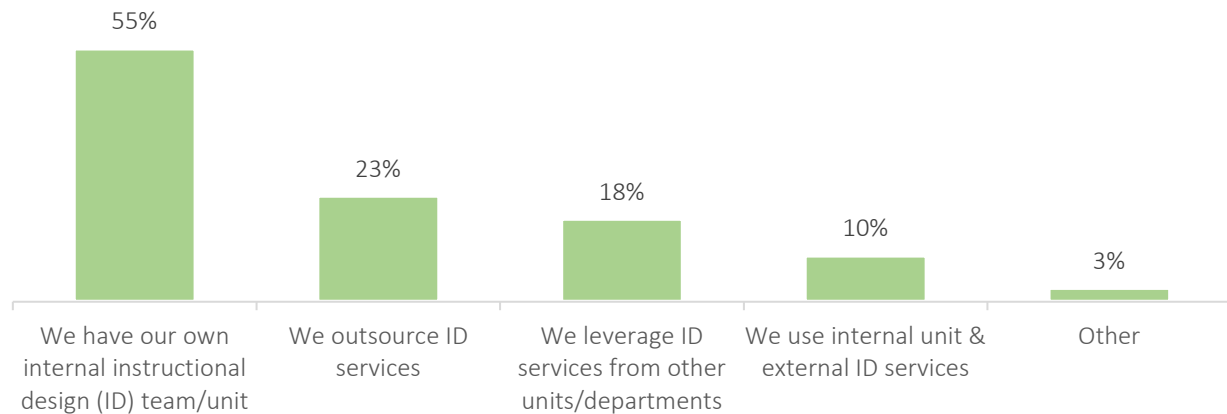
When asked who teaches online programs, 92% of respondents said full-time faculty, 86% said adjunct faculty, and 67% said instructors, with no faculty title.

Figure 26: Who teaches in your online programs? Please select all that apply (n=108)

92%	86%	67%	9%
Full-time Faculty	Adjunct Faculty	Instructors (no Faculty title)	Other
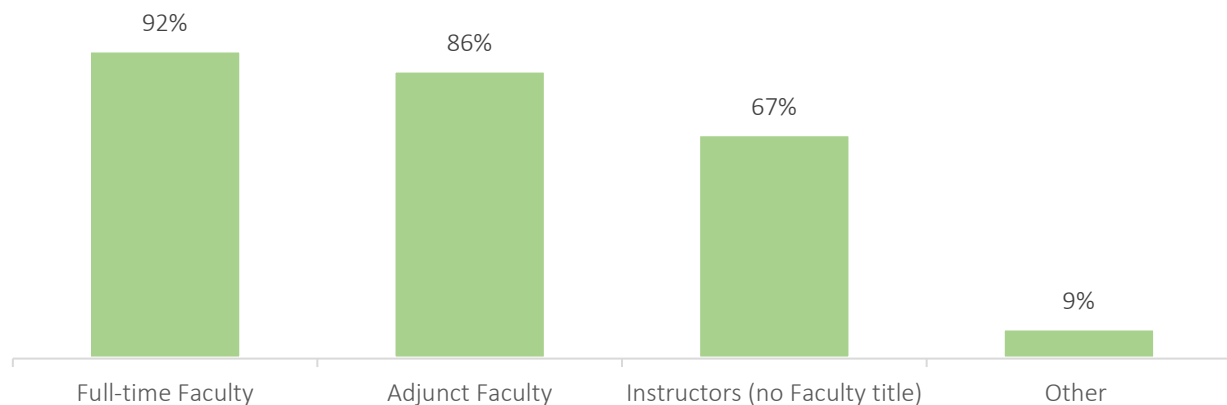
**Faculty Professional Development, Compensation, and Load**

Over half (54%) of respondents said online instructors at their institution are required to attend training or achieve proficiencies prior to teaching online, while 41% said they are not, and 6% were not sure.

Figure 27: Are your online instructors required to attend training or achieve proficiencies prior to teaching online? (n=108)
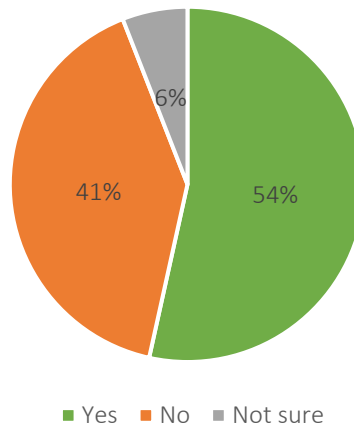
When asked about online program faculty compensation, 79% of respondents said that faculty teach online as a part of their regular course load, 61% receive monetary incentives for developing course content, and 57% are paid per course.

Figure 28: How are the faculty teaching in your online programs compensated? Please select all that apply (n=107)
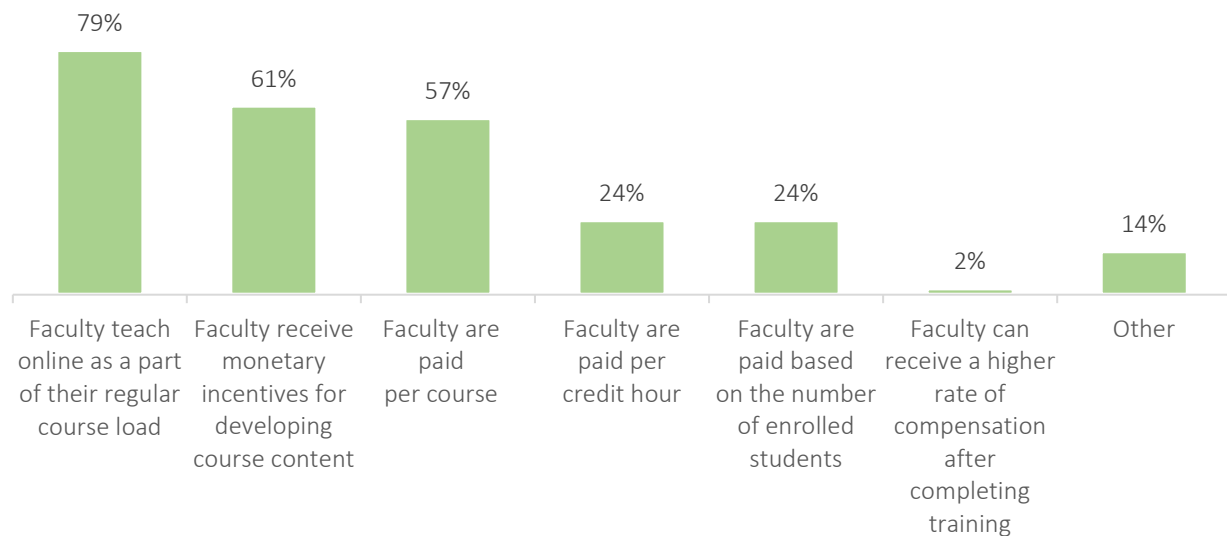
Sixty-two percent said online courses are discretionary, and depending on either faculty preference or department or college needs; 26% said online courses are considered part of load, and 12% overload.

Figure 29: Are online courses considered part of load / faculty contractual workload or overload? (n=107)
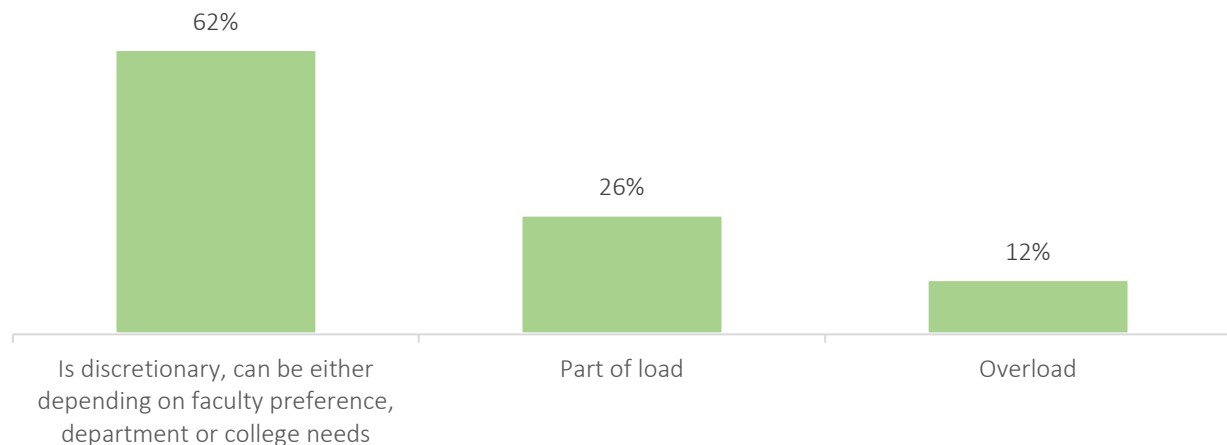
Three-quarters (75%) said salaries for instruction are paid by the academic department, 32% are paid by the online unit, and 8% are paid by the Provost's office.
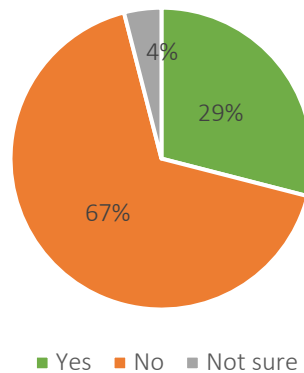
Figure 30: How are the salaries for instruction funded? Please select all that apply (n=107)
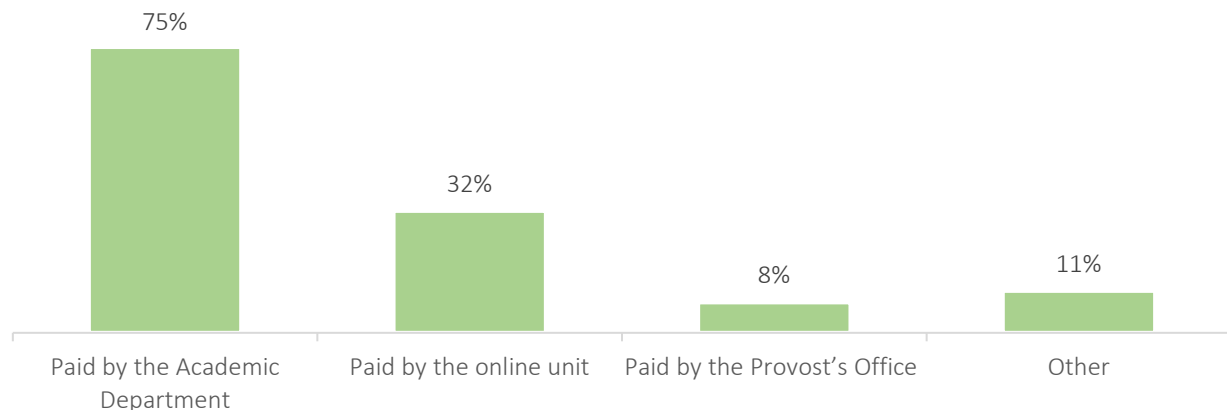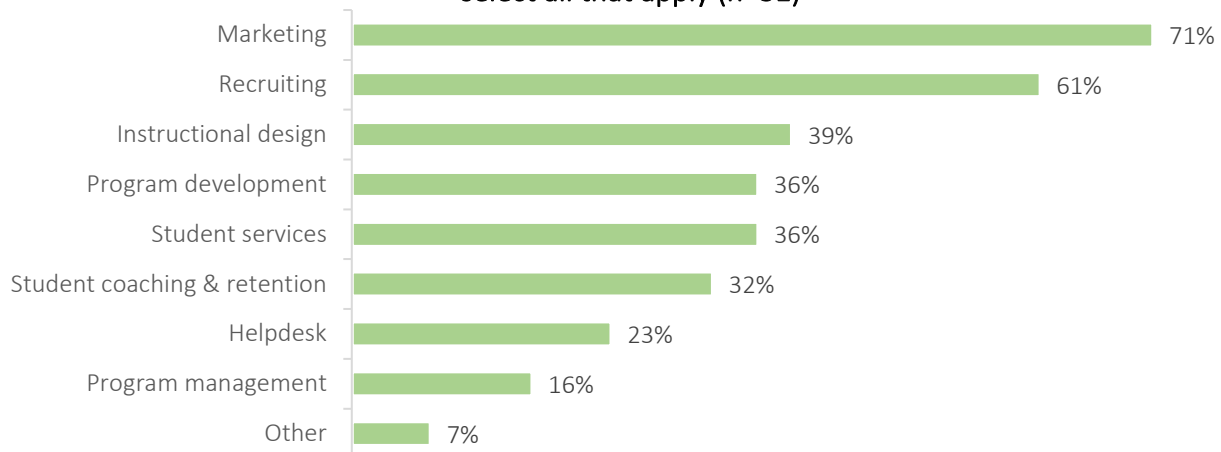
Contracted Services

Twenty-nine percent of respondents have online units that use contracted services, while 67% do not, and 4% are not sure.

Figure 31: Does your online education unit contract for services, often provided by an online program manager (OPM) organization? (n=107)


- Yes ■ No ■ Not sure

Among those who use contracted services, 71% use it for marketing, followed by recruiting (61%), instructional design (39%), program development (36%), and student services (also 36%).

Figure 32: Which of the following is your online education unit using outside vendors for? Please select all that apply (n=31)

Marketing	71%
Recruiting	61%
Instructional design	39%
Program development	36%
Student services	36%
Student coaching & retention	32%
Helpdesk	23%
Program management	16%
Other	7%

Among respondents whose online units use outside vendors, over half (55%) said outside vendors are compensated through tuition share, 48% have a fee for service, and for 10% there is a flat one-time payment.
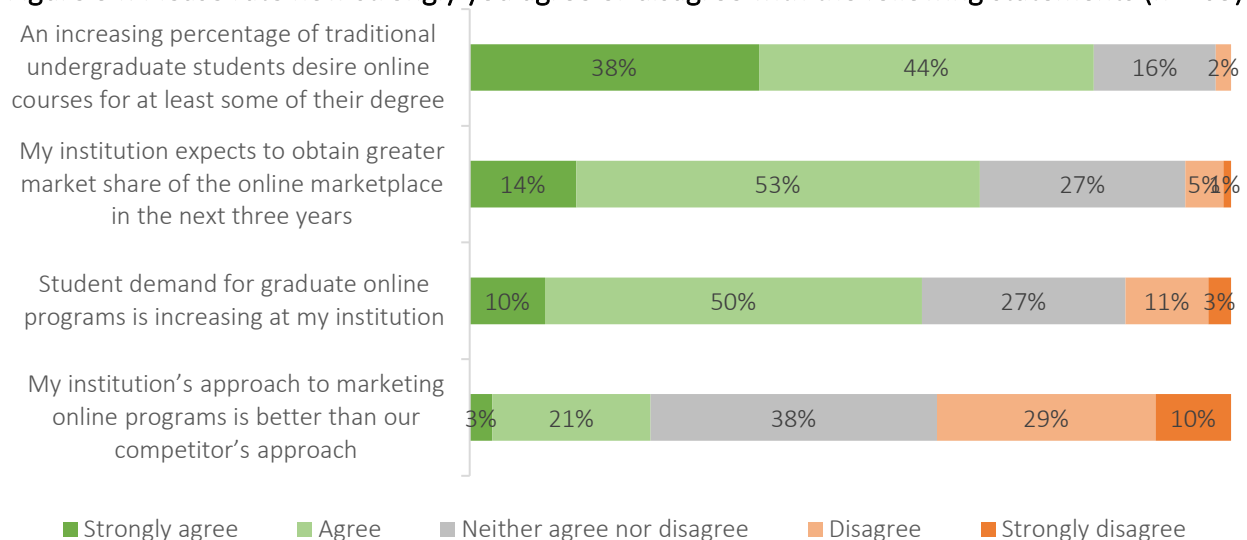
Figure 33: Which of the following best describes how your online unit compensates outside vendors? Please select all that apply (n=31)
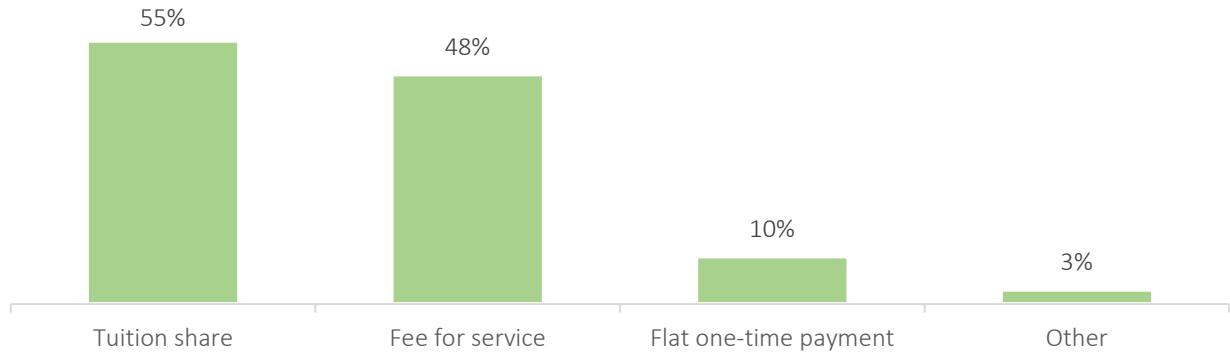
Growth in Online Demand

Eighty-two percent strongly agree or agree that an increasing percentage of traditional undergraduate students desire online courses for at least some of their degree, two-thirds (67%) strongly agree or agree that their institution expects to obtain greater market share of the online marketplace in the next three years, and 60% strongly agree or agree that student demand for graduate online programs in increasing at their institution. Thirty-nine percent disagree or strongly disagree that their institution's approach to marketing online programs is better than their competitor's approach.

Figure 34: Please rate how strongly you agree or disagree with the following statements (n=105)

Institution Size: Responses and Analysis

Key Findings

|	
Small Institutions (fewer than 5,000 undergraduate and graduate students)	• Small institutions are **most likely to say adjunct faculty** teach their online programs (82%). • They are **more likely** than the average to say **online instructors are required to attend training** prior to teaching online (64%), and to say **salaries are funded by their online unit (55%).** • Nearly two-thirds **(64%)** of small institutions **disagree or strongly disagree** that their institution's approach to marketing is better than their competitors. • Small institutions are the **least likely to agree or strongly agree** that their online unit has strategies to ensure inclusivity in online programs.
Medium Institutions (5,000 to 15,000 undergraduate and graduate students)	• Medium institutions are the **most likely to strongly agree or agree** that their online units are **academically (88%)** and **administratively (54%)** decentralized. • They are **more likely** than other institution sizes, and the average, to say their online unit **leverages a centralized instructional design team located elsewhere on campus** (29%). • They are **more likely** to **strongly agree or agree** that student demand for graduate online programs is increasing (74%), than the overall average and other institution sizes.
Large Institutions (more than 15,000 undergraduate and graduate students)	• Large institutions have the **highest average total budget ($10.7M)**, and **total gross revenue ($24M)** for their online units. • Large institutions are the **most likely** to say **faculty receive incentives for developing online course content (68%)**, more so than the average. • They are the most likely to fund instruction salaries through the academic department (83%). • Large institutions are **least likely to contract for services (23%)** compared to the average (29%), and other institution sizes. • They are the **most likely to strongly agree or agree** that their online unit has **established strategies** and efforts to ensure online programs **are inclusive and accessible (87%).**

Administrative and Academic Organization

Medium institutions are the most likely to strongly agree or agree that their online units are academically (88%) and administratively (54%) decentralized.

Figure 35: Please rate how strongly you agree or disagree with the following statements (% Strongly Agree or Agree) By Institution Size

- ■ My online unit is academically decentralized
- ■ My online unit is administratively decentralized
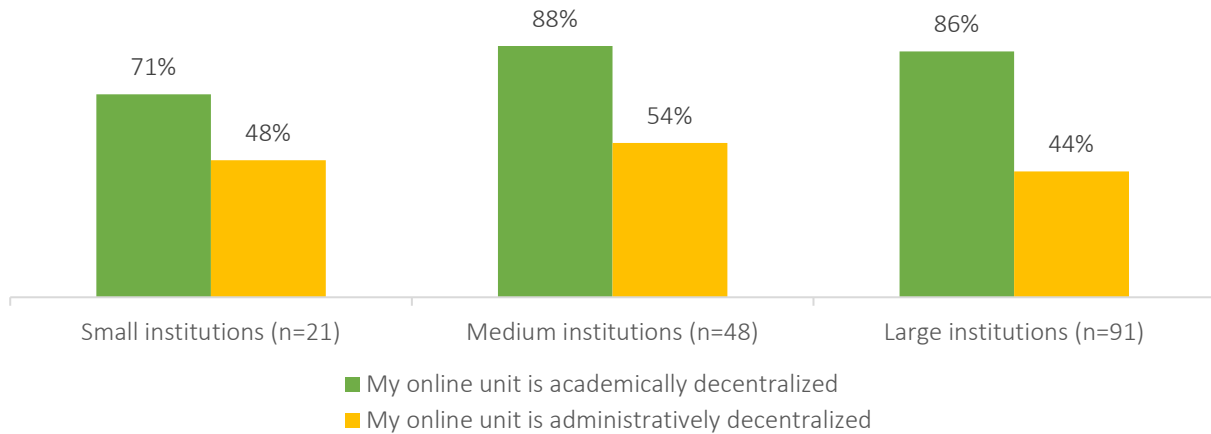
Over half (54%) of respondents from large institutions said their COLO primarily reports to the provost, followed by 47% of those from small institutions, and 45% of those from medium institutions.
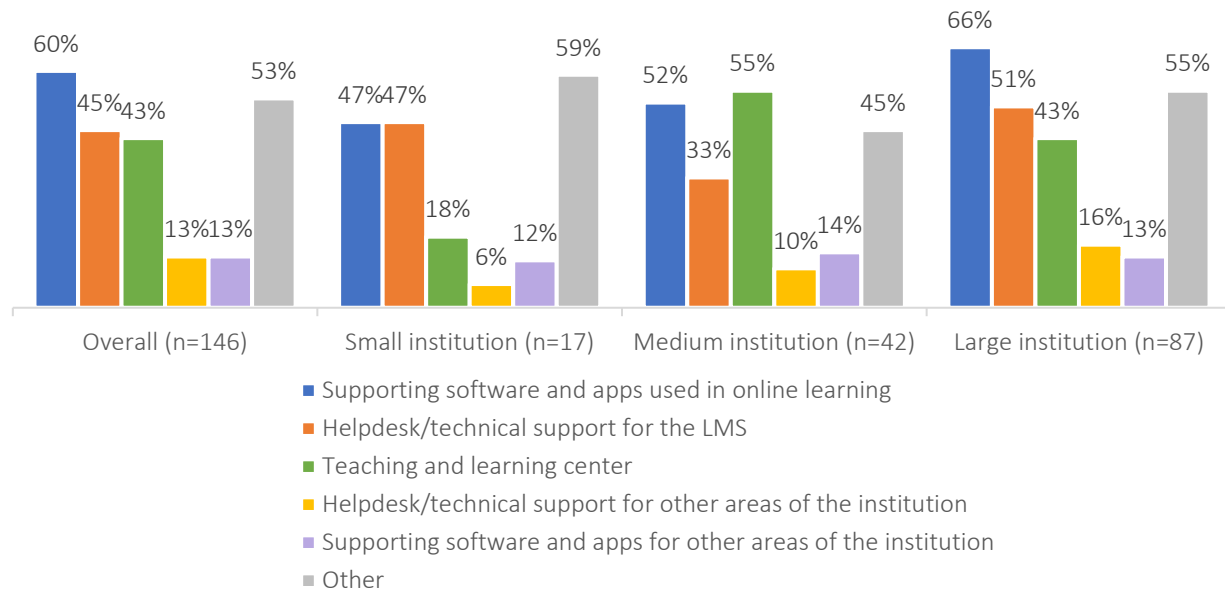
Figure 36: Who does the Chief Online Learning Officer (COLO) primarily report to? If the COLO has multiple reporting lines, inclusive of dotted lines, please choose "other" and describe the reporting relationships. By Institution Size

- ■ Provost
- ■ Dean of an academic unit
- ■ Institution President
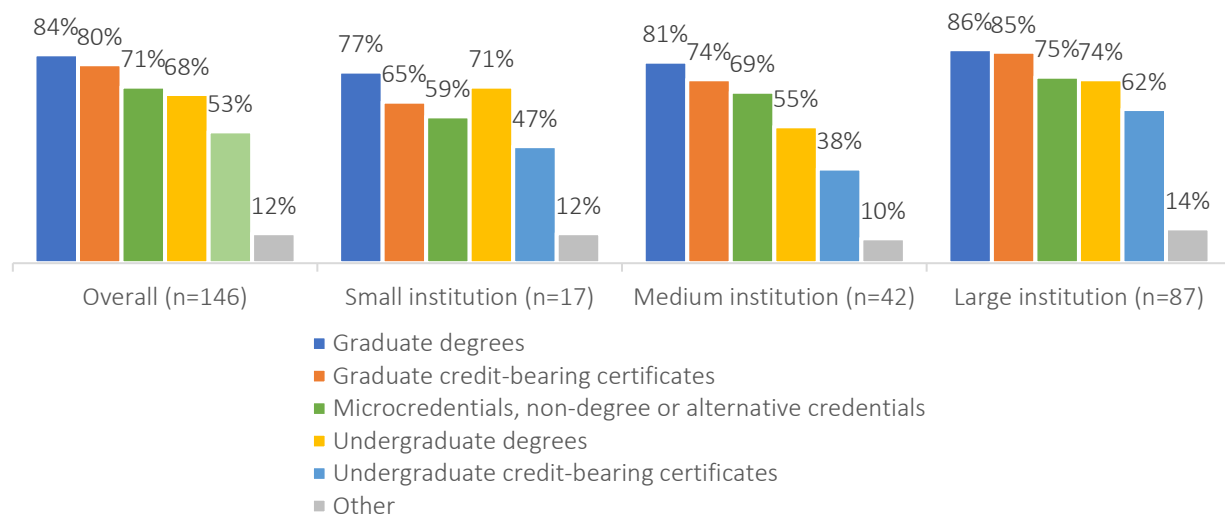- ■ Other
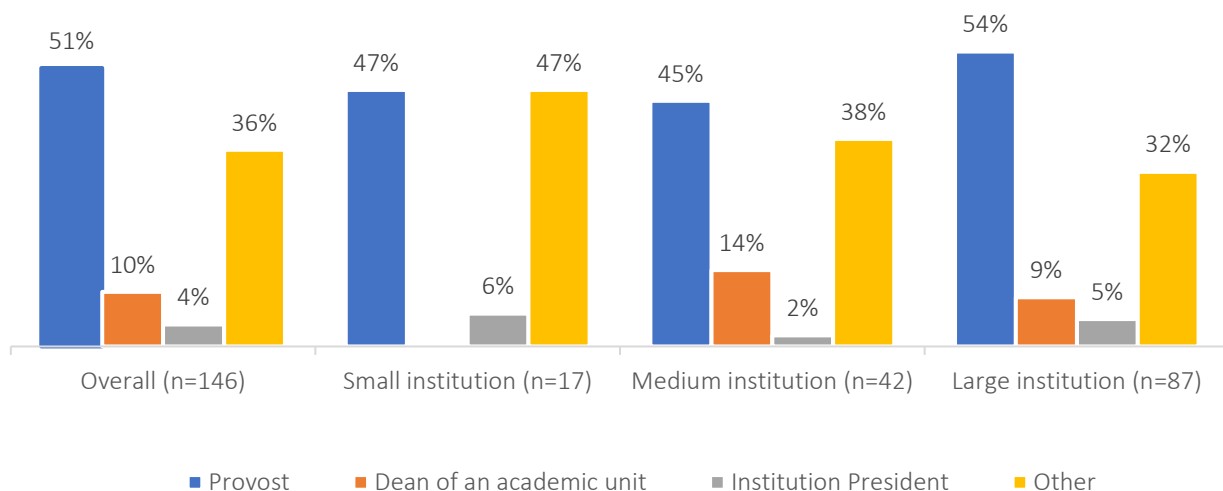
Services and Portfolio

Respondents from large institutions were the most likely to say their online education unit is responsible for supporting software and apps used in online learning (66%), while those from medium institutions were the most likely to say their unit is responsible for the teaching and learning center (55%).

Figure 37: Which of the following are responsibilities for your online education unit? Please select all that apply. By Institution Size

Legend:
- Supporting software and apps used in online learning
- Helpdesk/technical support for the LMS
- Teaching and learning center
- Helpdesk/technical support for other areas of the institution
- Supporting software and apps for other areas of the institution
- Other

Among all institution sizes, graduate degrees were the top program type included in online unit portfolios.

Figure 38: Which of the following program types are included in your online unit's portfolio of programs that it supports? Please select all that apply. By Institution Size

Legend:
- Graduate degrees
- Graduate credit-bearing certificates
- Microcredentials, non-degree or alternative credentials
- Undergraduate degrees
- Undergraduate credit-bearing certificates
- Other

Budget and Revenue

On average, large institutions' online unit's total budget was $10.7M for the 2022-2023 academic year, followed by medium institutions ($5.9M), and small institutions ($1.8M). The difference between average and median figures reflects variations in institutional budgets, indicating a range of budget sizes among institutions.

Figure 39: For the 2022-2023 academic year, what was your online unit's total budget? Please list the budget in USD. By Institution Size
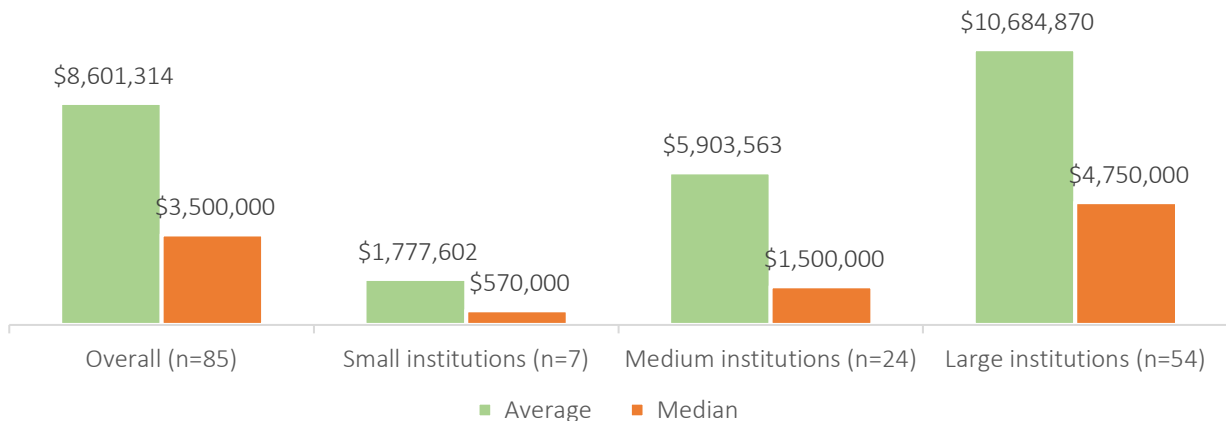
The average online unit total gross revenue for large institutions is about $24M for the 2022-2023 academic year, followed by medium institutions ($10.3M), and small institutions ($2.4M).
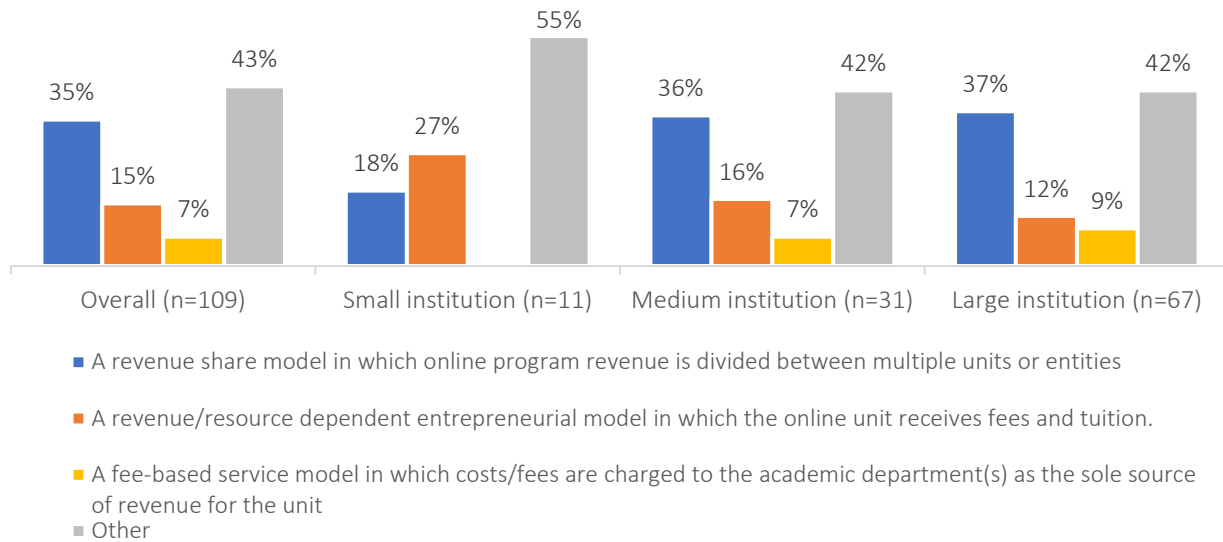
Figure 40: For the 2022-2023 academic year, what was your online unit's total *gross* revenue? Please list gross revenue in USD. By Institution Size
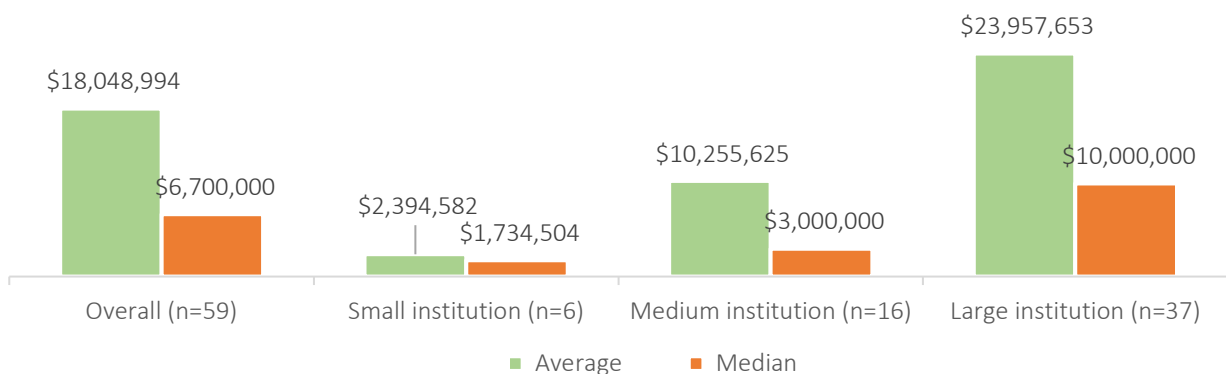
Financial Models

Large (37%) and medium (36%) institutions are most likely to have a revenue share model while small institutions (27%) are most likely to have a revenue/resource dependent entrepreneurial model. The largest proportion of respondents from all institution sizes listed financial models in the "Other" category.

Figure 41: Which of the following best describes your online unit's financial model? By Institution Size

■ A revenue share model in which online program revenue is divided between multiple units or entities

■ A revenue/resource dependent entrepreneurial model in which the online unit receives fees and tuition.

■ A fee-based service model in which costs/fees are charged to the academic department(s) as the sole source of revenue for the unit

■ Other

Staffing

On average, large institutions have 45 full-time or full-time equivalent (FTE) employees that are funded by their online unit, followed by medium institutions (13), and small institutions (8).

Figure 42: Including yourself, how many full-time or full-time equivalent (FTE) employees (i.e., two half-time employees equal one full-time employee) are funded by your online unit? By Institution Size

■ Average   ■ Median
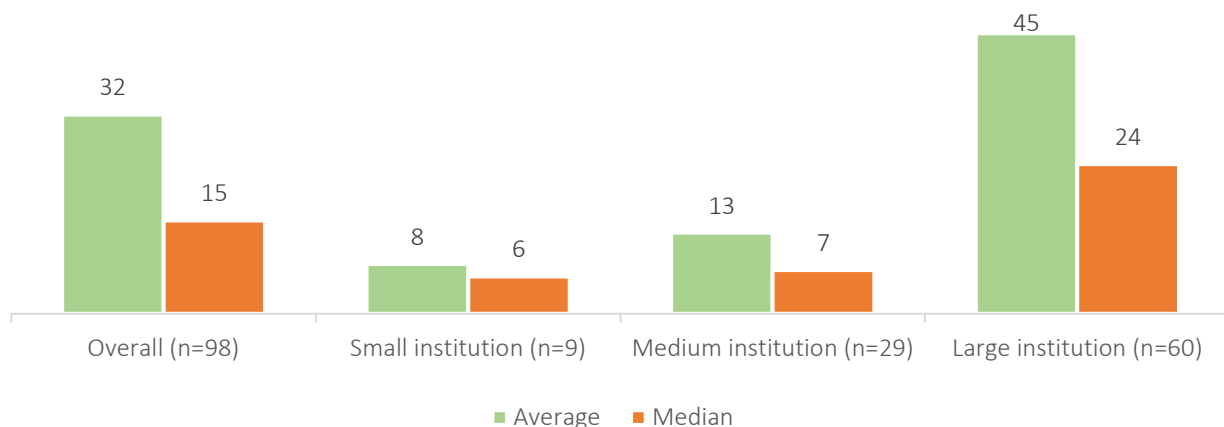
Small institutions have an average of 12 full-time or FTE employees that are involved in online learning but are funded outside of the online unit's budget, followed by large institutions (11), and medium institutions (5).

Figure 43: How many full-time or full-time equivalent (FTE) employees that are involved in online learning but are funded outside of the online unit's budget? By Institution Size

Average ■ Median
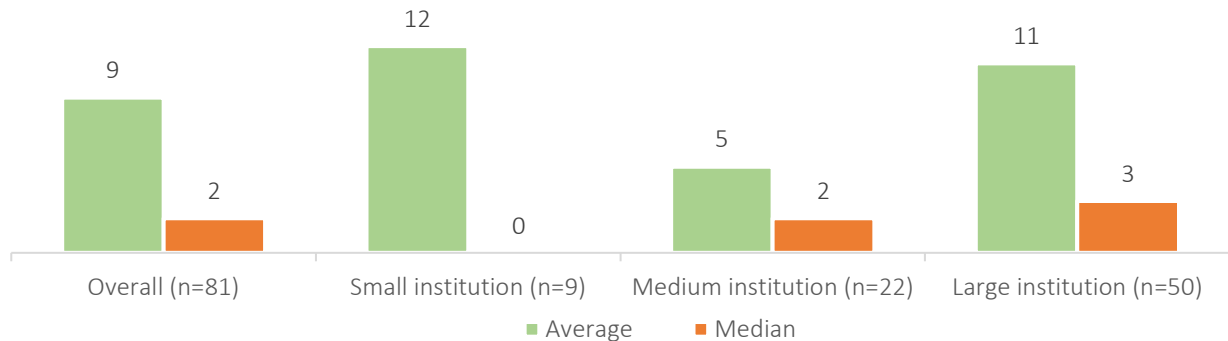
Instructional Design

Over half (56%) of large institutions have an online unit that supports the institution's centralized instructional design team, followed by 48% of medium institutions, and 36% of small institutions. Twenty-nine percent of medium institutions leverage a centralized instructional design team located elsewhere on campus, followed by 15% of large institutions.

Figure 44: What is the instructional design model that your online unit employs for the development of online programs? Please select all that apply. By Institution Size

■ Our online unit supports the institution's centralized instructional design team

■ Our online unit leverages a centralized instructional design team located elsewhere on campus

■ Our online unit leverages instructional design teams from other academic units

■ Other
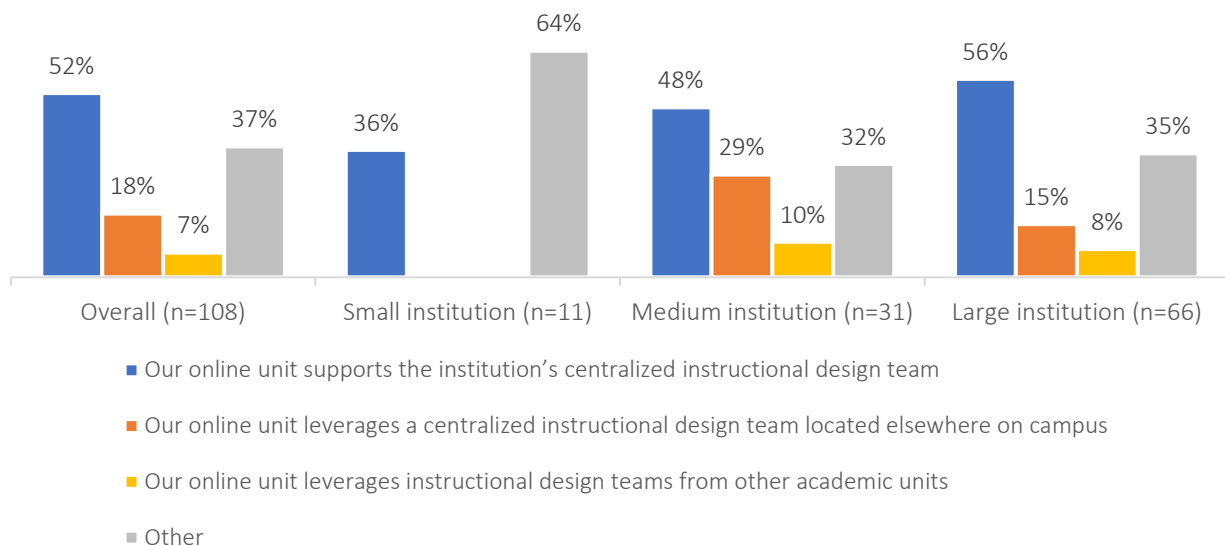
Faculty Professional Development, Compensation, and Load

Small institutions are most likely to say adjunct faculty teach their online programs (82%) as opposed to full-time faculty (73%), while medium (97%) and large (92%) institutions are most likely to say full-time faculty teach their online programs.

Figure 45: Who teaches in your online programs? Please select all that apply. By Institution Size
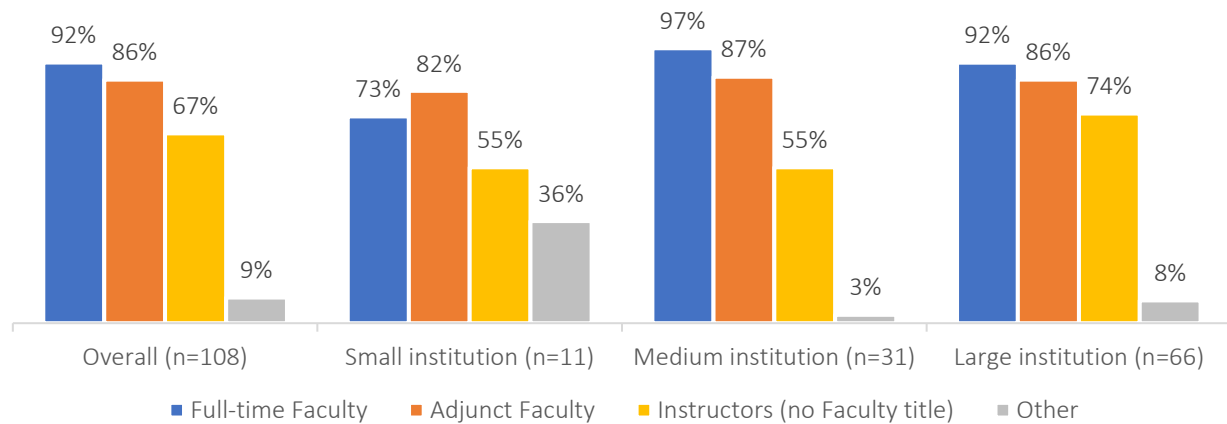
Respondents from small institutions are the most likely to say online instructors are required to attend training or achieve proficiencies prior to teaching online (64%), followed by medium institutions (55%), and large institutions (52%).

Figure 46: Are your online instructors required to attend training or achieve proficiencies prior to teaching online? By Institution Size
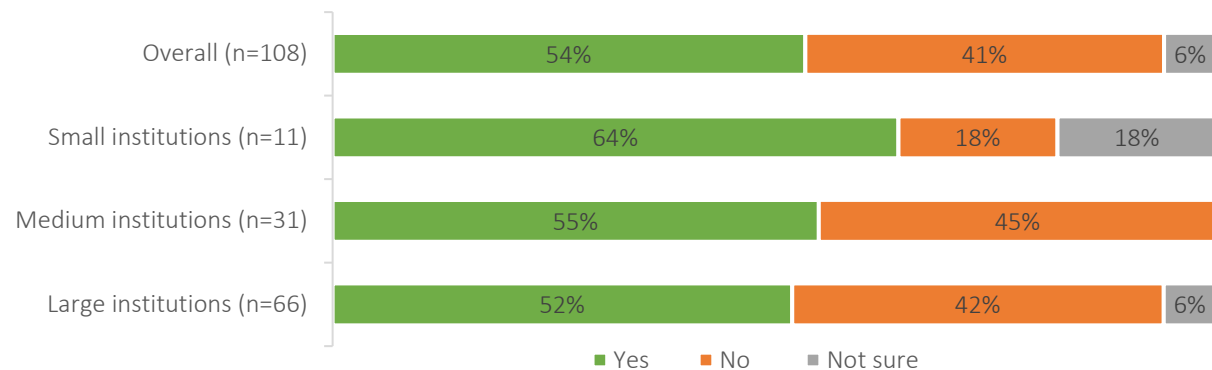
When asked how the faculty teaching online programs are compensated, respondents from all institution sizes said their faculty teach online courses as a part of their regular course load.

Figure 47: How are the faculty teaching in your online programs compensated? Please select all that apply. By Institution Size
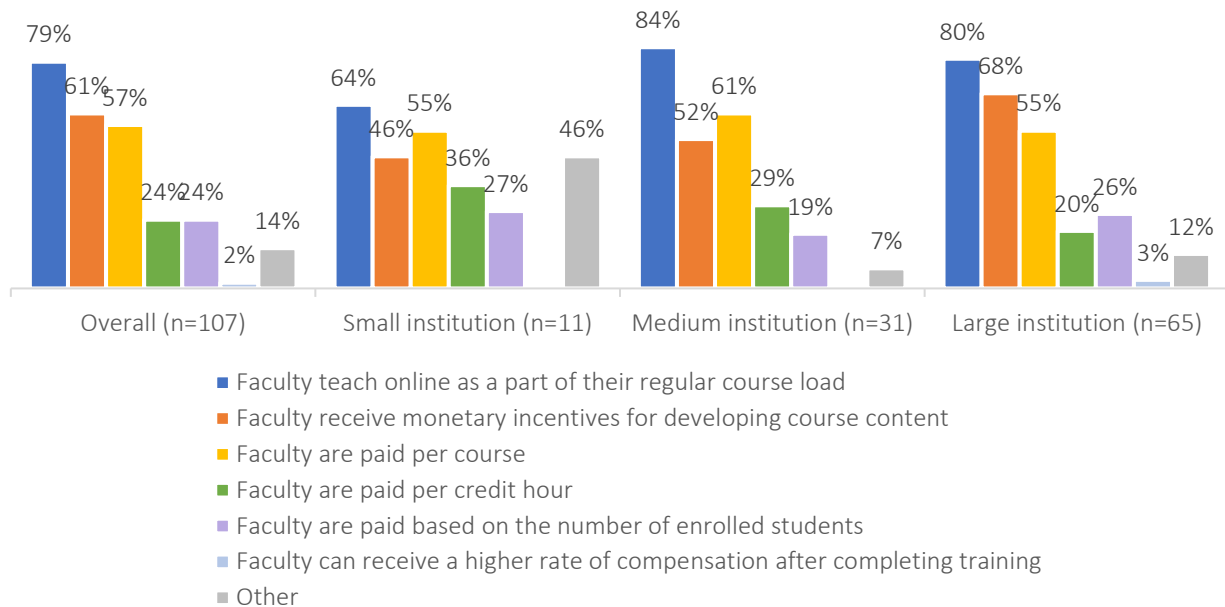

- Faculty teach online as a part of their regular course load
- Faculty receive monetary incentives for developing course content
- Faculty are paid per course
- Faculty are paid per credit hour
- Faculty are paid based on the number of enrolled students
- Faculty can receive a higher rate of compensation after completing training
- Other

Over two-thirds (68%) of medium institutions said online courses are discretionary and can be either in-load or overload depending on faculty preference, department or college needs, followed by 60% of large institutions, and 55% of small institutions.

Figure 48: Are online courses considered part of load / faculty contractual workload or overload? By Institution Size

- Is discretionary, can be either depending on faculty preference, department or college needs
- Part of load
- Overload
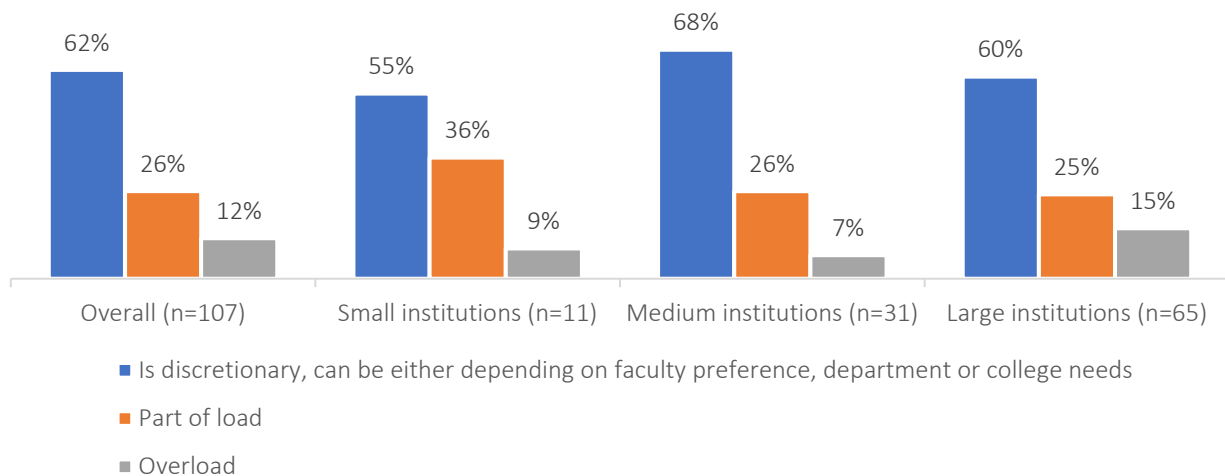
Eighty-three percent of large institutions fund instructor salaries through the academic department, followed by 64% of small institutions, and 61% of medium institutions. Notably, over half (55%) of small institutions fund instructor salaries through the online unit.

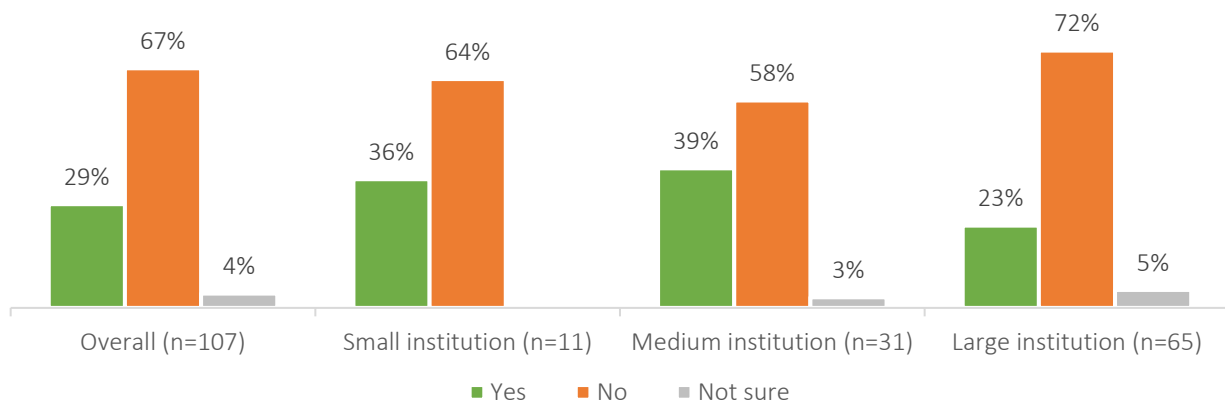**Figure 49: How are the salaries for instructors funded? Please select all that apply. By Institution Size**

Overall (n=107): Paid by the Academic Department 75%, Paid by the online unit 32%, Paid by the Provost's Office 8%, Other 11%

Small institution (n=11): Paid by the Academic Department 64%, Paid by the online unit 55%, Paid by the Provost's Office 18%, Other 9%

Medium institution (n=31): Paid by the Academic Department 61%, Paid by the online unit 39%, Paid by the Provost's Office 7%, Other 16%

Large institution (n=65): Paid by the Academic Department 83%, Paid by the online unit 25%, Paid by the Provost's Office 6%, Other 9%

■ Paid by the Academic Department ■ Paid by the online unit ■ Paid by the Provost's Office ■ Other
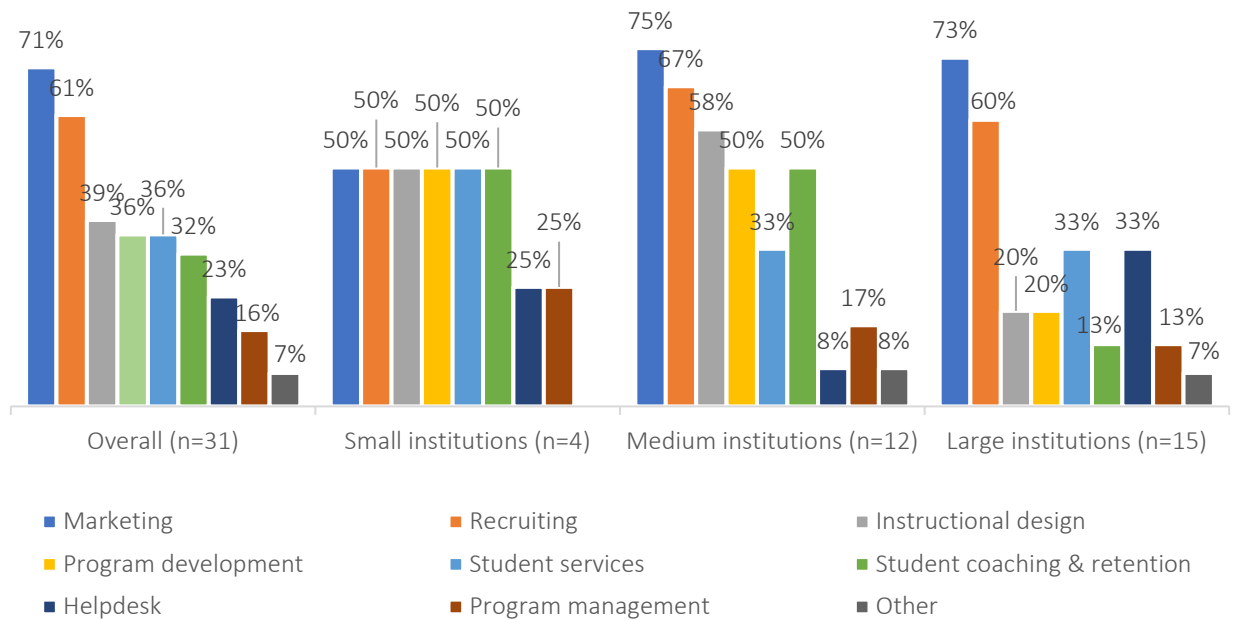
Contracted Services

Medium institutions are most likely to have their online education unit contract for services (39%), followed by small institutions (36%), and large institutions (23%).

Figure 50: Does your online education unit contract for services, often provided by an online program manager (OPM) organization? By Institution Size


Overall (n=107): Yes 29%, No 67%, Not sure 4%

Small institution (n=11): Yes 36%, No 64%

Medium institution (n=31): Yes 39%, No 58%, Not sure 3%

Large institution (n=65): Yes 23%, No 72%, Not sure 5%

■ Yes ■ No ■ Not sure

Of the institutions using outside vendors for services, the most common services contracted are for marketing and recruiting purposes.

Figure 51: Which of the following is your online education unit using outside vendors for? Please select all that apply. By Institution Size

Legend:
- Marketing
- Recruiting
- Instructional design
- Program development
- Student services
- Student coaching & retention
- Helpdesk
- Program management
- Other

Of the institutions using outside vendors for services, all small institutions and 58% of medium institutions use tuition share to compensate outside vendors. However, 60% of large institutions pay a fee for service.
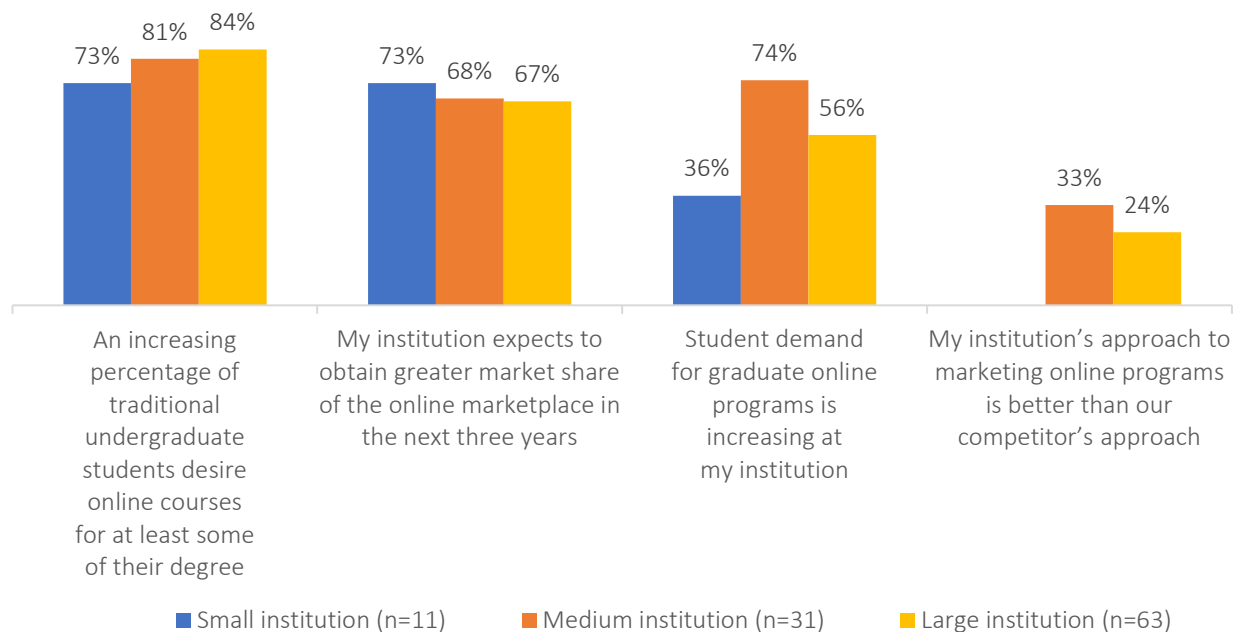
Figure 52: Which of the following best describe how your online unit compensates outside vendors? Please select all that apply. By Institution Size

Legend:
- Tuition share
- Fee for service
- Flat one-time payment
- Other
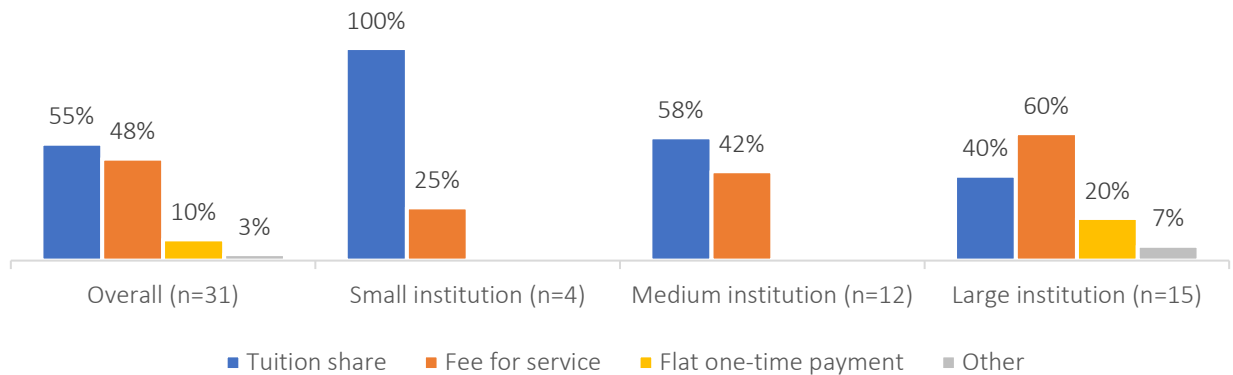
Growth in Online Demand

Respondents from all institution sizes are the most likely to strongly agree or agree that an increasing percentage of traditional undergraduate students desire online courses for at least some of their degree. Those from medium and large institutions are the least likely to strongly agree or agree that their institution's approach to marketing is better than their competitor's approach.

Figure 53: Please rate how strongly you agree or disagree with the following statements. By Institution Size

Legend:
- Small institution (n=11)
- Medium institution (n=31)
- Large institution (n=63)

Institution Type: Responses and Analysis

Key Findings

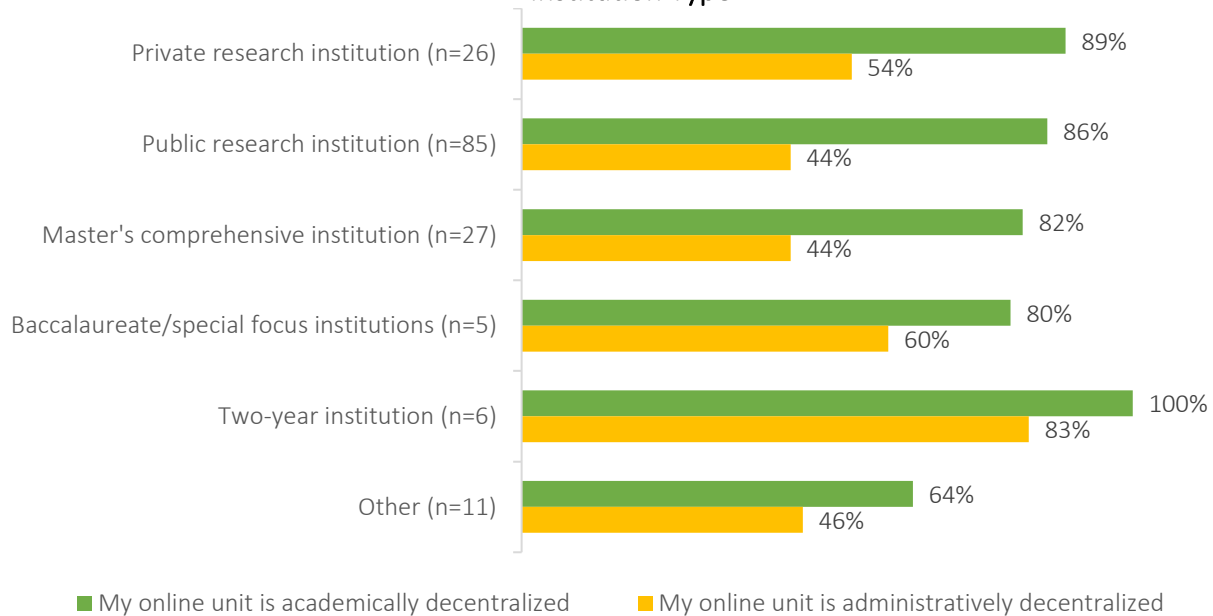|	
Private Research Institutions	• Private research institutions are the **most likely to offer online graduate degrees (96%),** more so than the **average for all institution types (84%).** • These institutions have a **significantly higher average total budget** for their online unit **($15.2M),** and the **highest total gross revenue ($27.7M).** • **All** said **full-time faculty teach their online programs.** • They are the **most likely to pay faculty per course for online instruction (82%),** significantly higher than the **average (57%).**
Public Research Institutions	• Public research institutions are the **most likely to offer undergraduate credit-bearing certificates (61%),** more so than **the overall average (53%).** • These institutions have a **significantly higher average number of full-time or FTE employees** funded by their online unit **(43).** • They are among the **least likely** to say their online education unit **contracts for services (25%),** lower than the **overall average (29%).**
Master's Comprehensive Institutions	• **Three-quarters (75%)** of master's comprehensive institutions said **supporting software and apps** used in online learning is the **responsibility** of their online unit, more so than the **overall average (60%).** • **For 67%,** their online unit **supports the institution's centralized instructional design team,** higher than the overall **average (52%).** • **All** said **full-time faculty teach their online programs.** • These institutions are the **least likely** to require online instructors **to attend training prior to teaching online (40%),** lower than the **average (54%).** • They are the **most likely** to have **faculty teach online** as a part of their **regular course load (87%).**
Baccalaureate/ Special Focus Institutions	• Baccalaureate/special focus institutions are the **least likely** to say **supporting software and apps used in online learning (20%) and help desk/technical support for the LMS (20%) are responsibilities** for their online education unit. • These institutions are among the **most likely** to **offer microcredentials, non-degree or alternative credentials (80%),** higher than the **average (71%).**

|	
	• Baccalaureate/special focus institutions' online units are the **most likely** to **leverage a centralized instructional design team located elsewhere on campus (50%),** significantly higher than the **average (18%).** • They are the **least likely** to have **adjunct faculty** teach their online programs **(25%).** • They are the **most likely** to pay **faculty who teach online programs based on the number of enrolled students (75%).** • Three-quarters **(75%)** of these institutions **fund instructors' salaries through their online unit**, much higher than the **average (32%).** • **No** baccalaureate/special focus institutions **strongly agree or agree** that their institution's **approach to marketing online programs is better than their competitor's approach.**
Two-year Institutions	• **All** six two-year institutions have their online unit academically **decentralized**, and for **83%,** they are **administratively decentralized.** • These institutions had the **lowest average total budget** for their online unit **($570,400)**, and the **lowest average total gross revenue ($151,500).** • Two-year institutions are the **most likely** to have their online unit **support the institution's centralized instructional design team (80%)**, higher than the **overall average (52%).** • They are the **most likely** to require online instructors **to attend training prior to teaching online (80%),** higher than the **average (54%).** • They are the **most likely** to pay faculty who teach online programs **per credit hour (60%).** • **No** two-year institutions **strongly agree or agree** that their institution's **approach to marketing online programs is better than their competitor's approach.**

Administrative and Academic Organization

Two-year institutions are the most likely to strongly agree or agree that their online unit is academically decentralized (100%), followed by private research institutions (89%), and public research institutions (86%).

Figure 54: Please rate how strongly you agree or disagree with the following statements By Institution Type

- Private research institution (n=26): My online unit is academically decentralized 89%, My online unit is administratively decentralized 54%
- Public research institution (n=85): My online unit is academically decentralized 86%, My online unit is administratively decentralized 44%
- Master's comprehensive institution (n=27): My online unit is academically decentralized 82%, My online unit is administratively decentralized 44%
- Baccalaureate/special focus institutions (n=5): My online unit is academically decentralized 80%, My online unit is administratively decentralized 60%
- Two-year institution (n=6): My online unit is academically decentralized 100%, My online unit is administratively decentralized 83%
- Other (n=11): My online unit is academically decentralized 64%, My online unit is administratively decentralized 46%

■ My online unit is academically decentralized   ■ My online unit is administratively decentralized

Respondents from master's comprehensive institutions (58%), public research institutions (54%), and private research institutions (50%) are most likely to have their COLO primarily report to the Provost, while those from baccalaureate/special focus institutions (60%) and two-year institutions (80%) were most likely to choose the "Other" category when asked who their COLO primarily reports to.
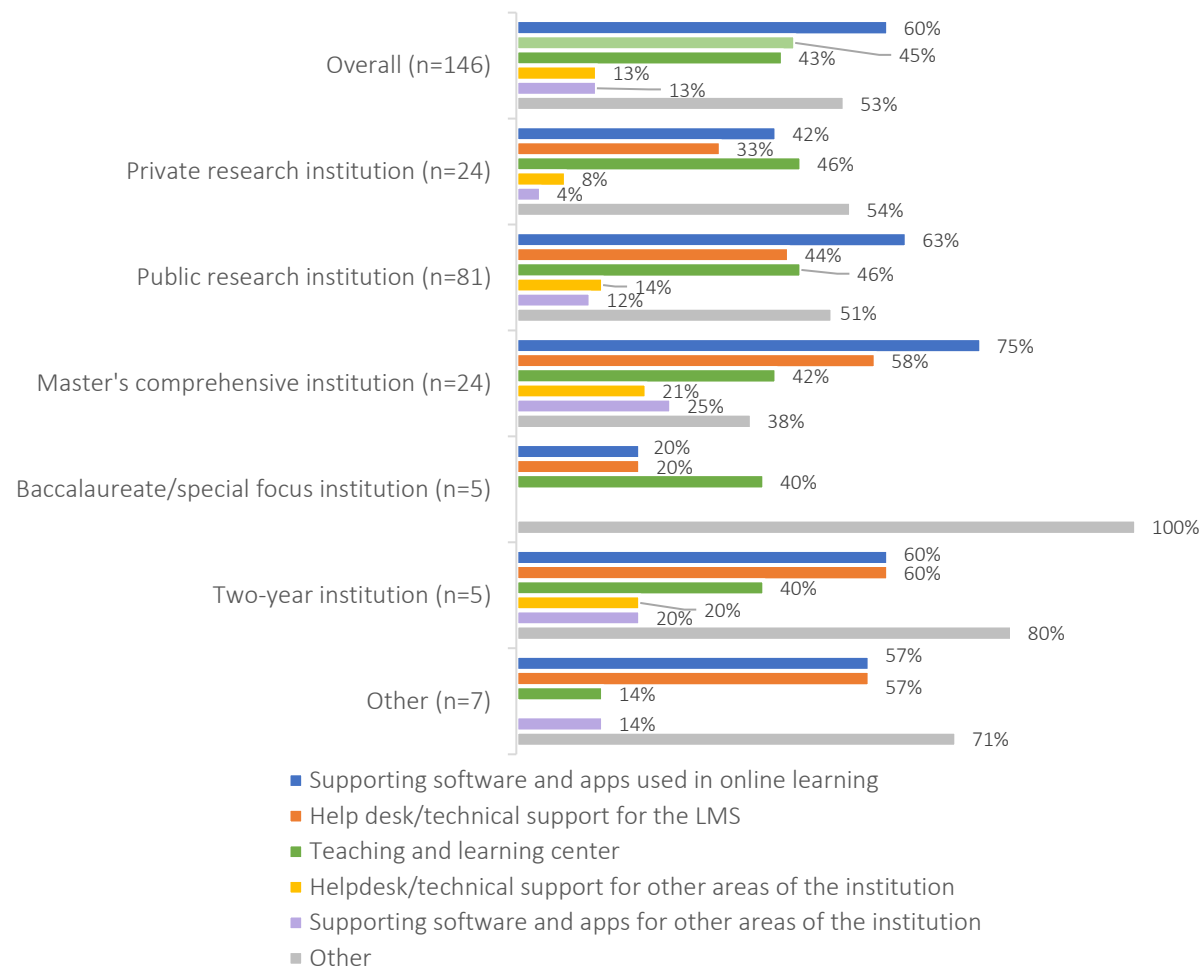
Figure 55: Who does the Chief Online Learning Officer (COLO) primarily report to? If the COLO has multiple reporting lines, inclusive of dotted lines, please choose "other" and describe the reporting relationships. By Institution Type
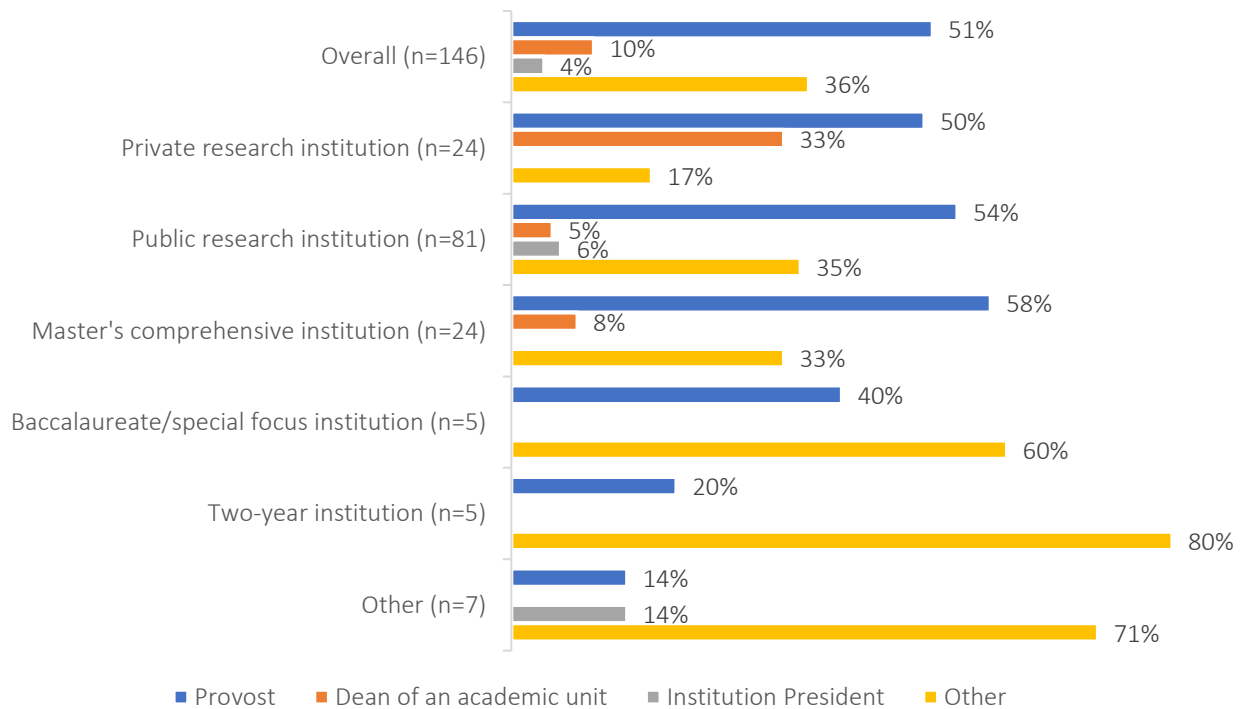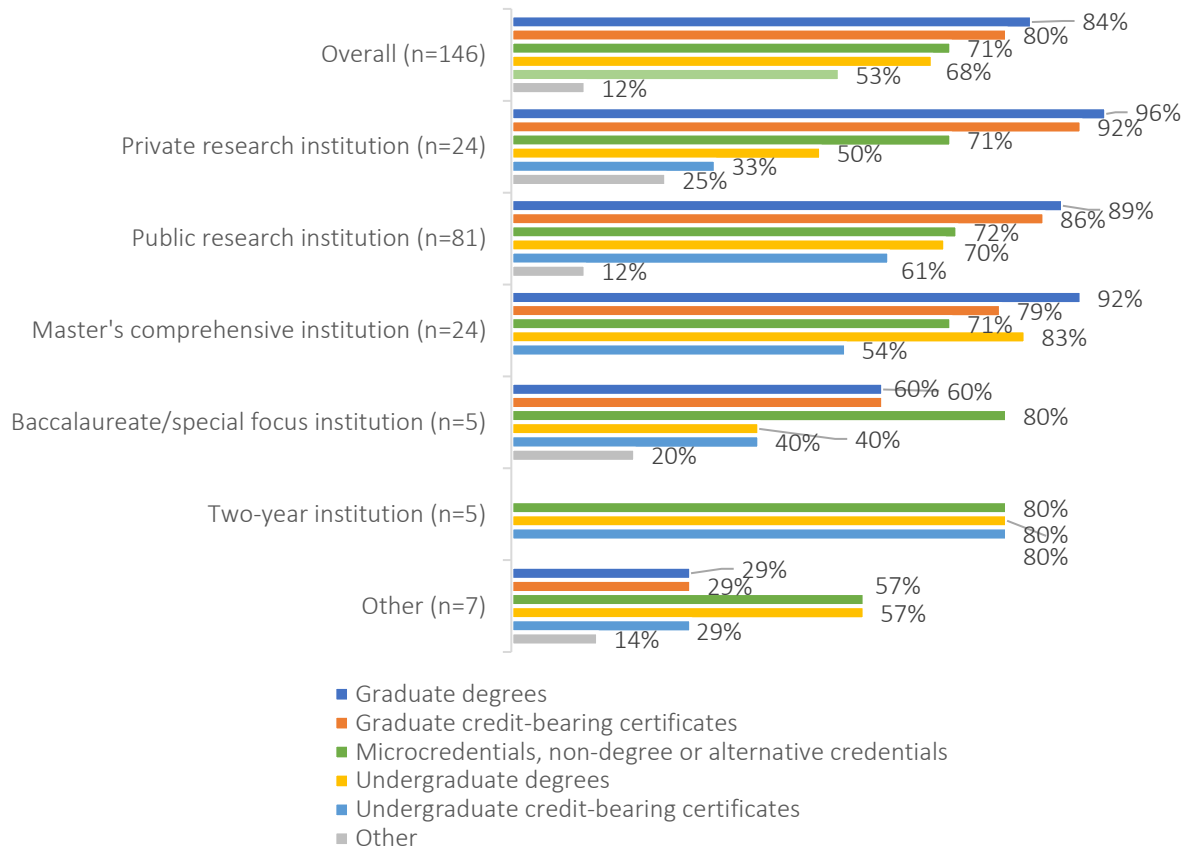
Services and Portfolio

Among all institution types, the top three responsibilities for online education units include supporting software and apps used in online learning, help desk/technical support for the LMS, and the teaching and learner center.

Figure 56: Which of the following are responsibilities for your online education unit? Please select all that apply. By Institution Type

Legend:
- ■ Supporting software and apps used in online learning
- ■ Help desk/technical support for the LMS
- ■ Teaching and learning center
- ■ Helpdesk/technical support for other areas of the institution
- ■ Supporting software and apps for other areas of the institution
- ■ Other

Private research institutions, public research institutions, and master's comprehensive institutions all listed graduate degrees as the top program type included in online unit portfolios.
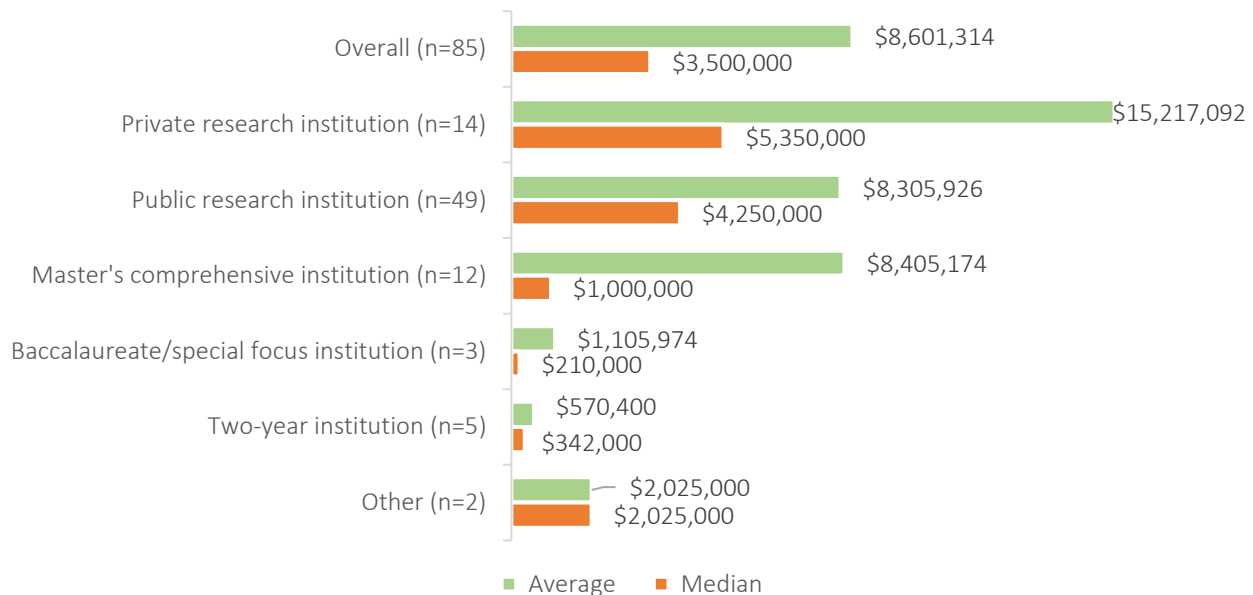
Figure 57: Which of the following program types are included in your online unit's portfolio of programs that it supports? Please select all that apply. By Institution Type

Legend:
- Graduate degrees
- Graduate credit-bearing certificates
- Microcredentials, non-degree or alternative credentials
- Undergraduate degrees
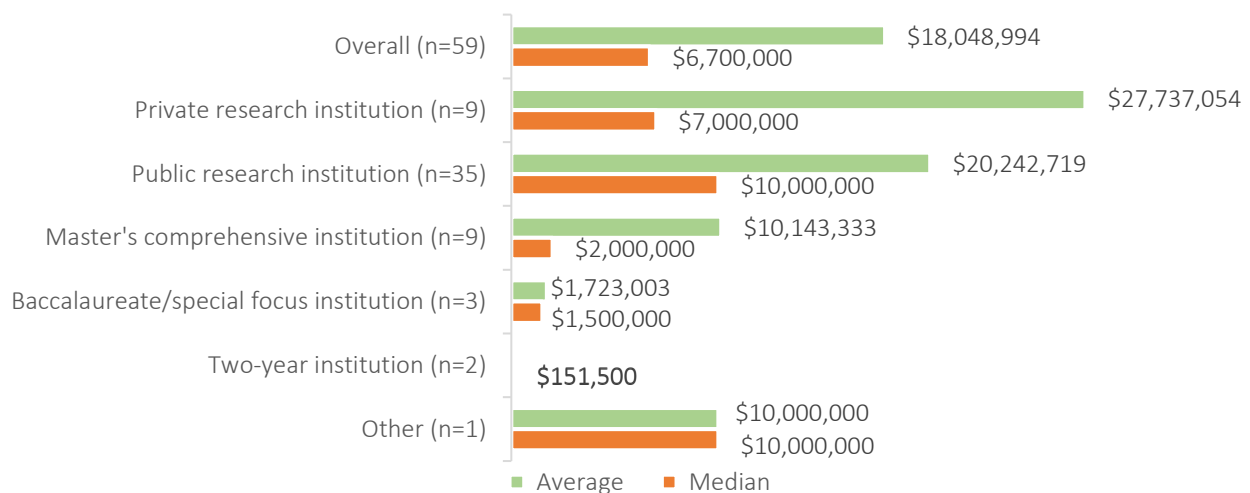- Undergraduate credit-bearing certificates
- Other

Budget and Revenue

Private research institutions had a significantly higher average total budget for their online unit ($15.2M), followed by master's comprehensive institutions ($8.4M), and public research institutions ($8.3M).

Figure 58: For the 2022-2023 academic year, what was your online unit's total budget? Please list the budget in USD. By Institution Type

Institution Type	Average	Median
Overall (n=85)	$8,601,314	$3,500,000
Private research institution (n=14)	$15,217,092	$5,350,000
Public research institution (n=49)	$8,305,926	$4,250,000
Master's comprehensive institution (n=12)	$8,405,174	$1,000,000
Baccalaureate/special focus institution (n=3)	$1,105,974	$210,000
Two-year institution (n=5)	$570,400	$342,000
Other (n=2)	$2,025,000	$2,025,000

Private research institutions had the highest average total gross revenue for their online unit ($27.7M), followed by public research institutions ($20.2M), and master's comprehensive institutions ($10.1M).
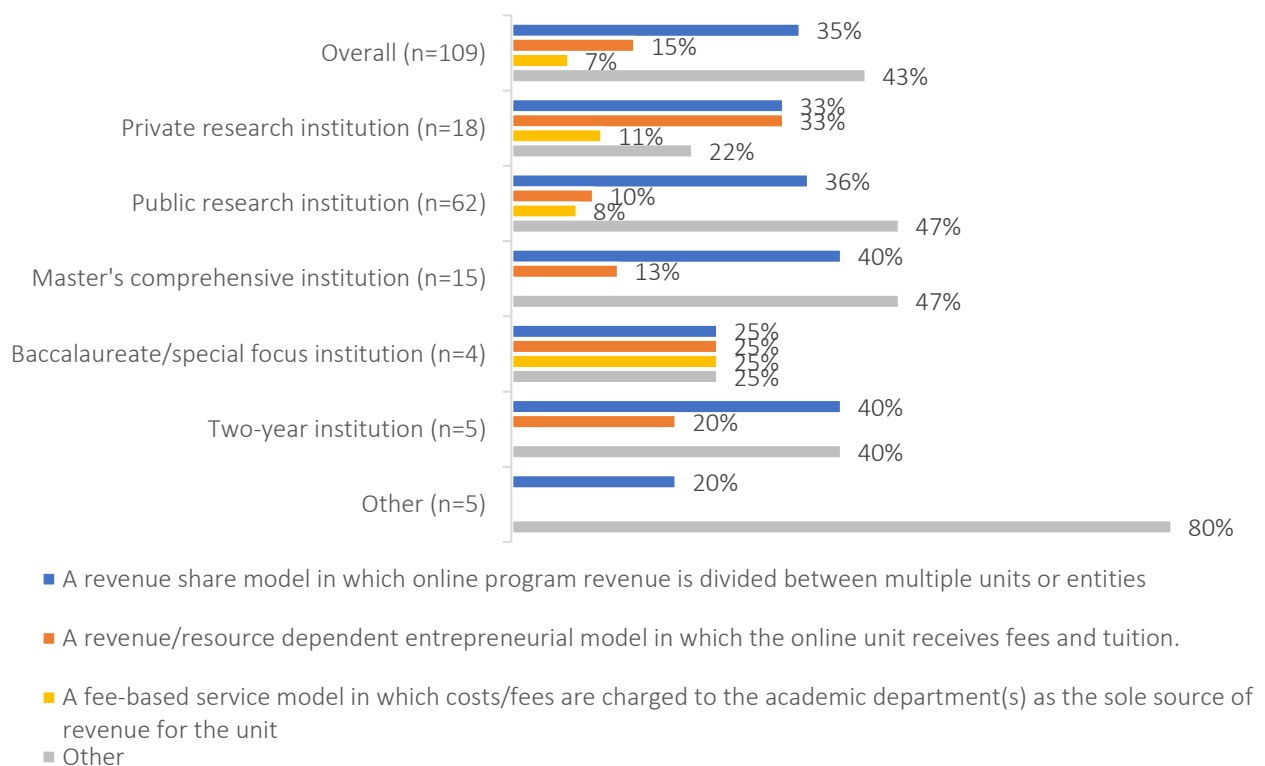
Figure 59: For the 2022-2023 academic year, what was your online unit's total *gross* revenue? Please list gross revenue in USD. By Institution Type

Institution Type	Average	Median
Overall (n=59)	$18,048,994	$6,700,000
Private research institution (n=9)	$27,737,054	$7,000,000
Public research institution (n=35)	$20,242,719	$10,000,000
Master's comprehensive institution (n=9)	$10,143,333	$2,000,000
Baccalaureate/special focus institution (n=3)	$1,723,003	$1,500,000
Two-year institution (n=2)	$151,500	
Other (n=1)	$10,000,000	$10,000,000

Financial Models

Forty percent of both master's comprehensive and two-year institutions use a revenue share model, compared to public research institutions (36%), private research institutions (33%), and baccalaureate/special focus institutions (25%).

Figure 60: Which of the following best describes your online unit's financial model? By Institution Type

Institution Type	Revenue share model	Revenue/resource dependent entrepreneurial model	Fee-based service model	Other
Overall (n=109)	35%	15%	7%	43%
Private research institution (n=18)	33%	33%	11%	22%
Public research institution (n=62)	36%	10%	8%	47%
Master's comprehensive institution (n=15)	40%	13%		47%
Baccalaureate/special focus institution (n=4)	25%	25%	25%	25%
Two-year institution (n=5)	40%	20%		40%
Other (n=5)	20%			80%

■ A revenue share model in which online program revenue is divided between multiple units or entities

■ A revenue/resource dependent entrepreneurial model in which the online unit receives fees and tuition.

■ A fee-based service model in which costs/fees are charged to the academic department(s) as the sole source of revenue for the unit

■ Other

Staffing

Public research institutions have a significantly higher average number of full-time or FTE employees who are funded by their online unit (43), followed by private research institutions (24), and master's comprehensive institutions (16).

Figure 61: Including yourself, how many full-time or full-time equivalent (FTE) employees (i.e., two half-time employees equal one full-time employee) are funded by your online unit? By Institution Type
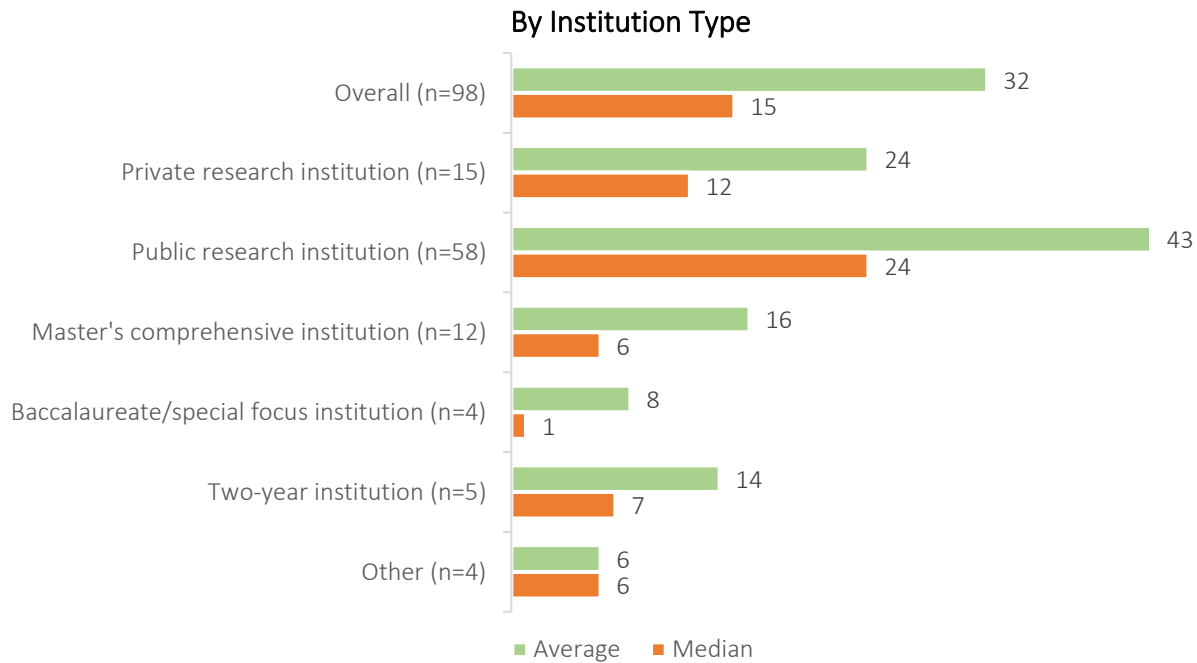
On average, private research institutions have 13 full-time or FTE employees who are involved in online learning but funded outside of the online unit's budget, followed by public research institutions (10) and two-year institutions (10).
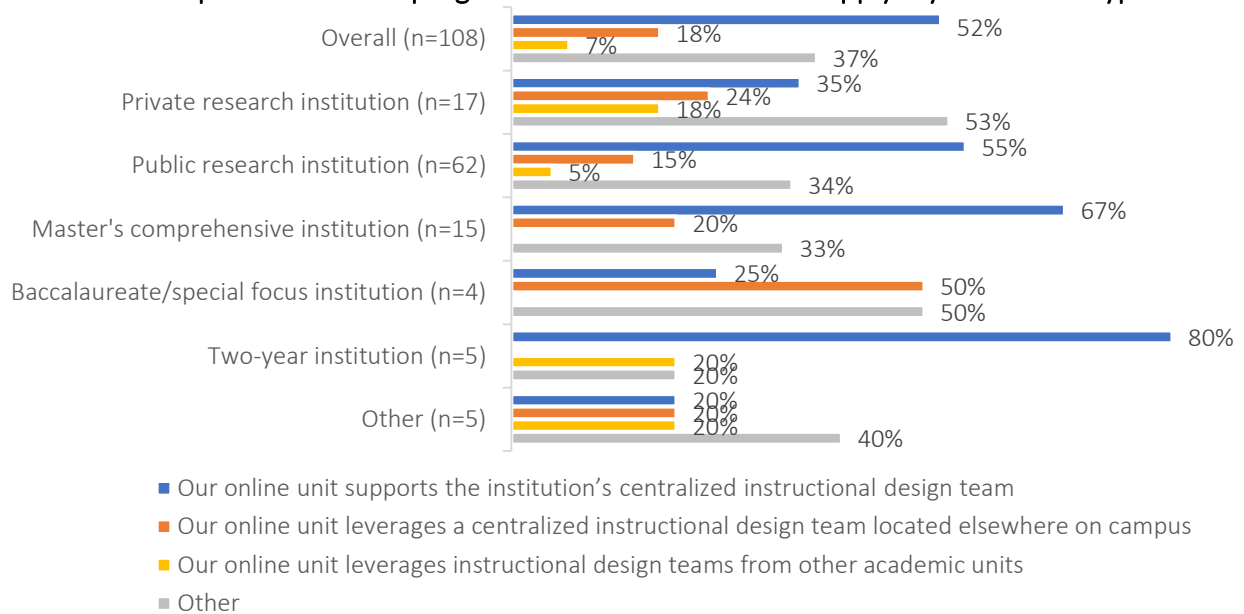
Figure 62: How many full-time or full-time equivalent (FTE) employees who are involved in online learning but are funded outside of the online unit's budget? By Institution Type
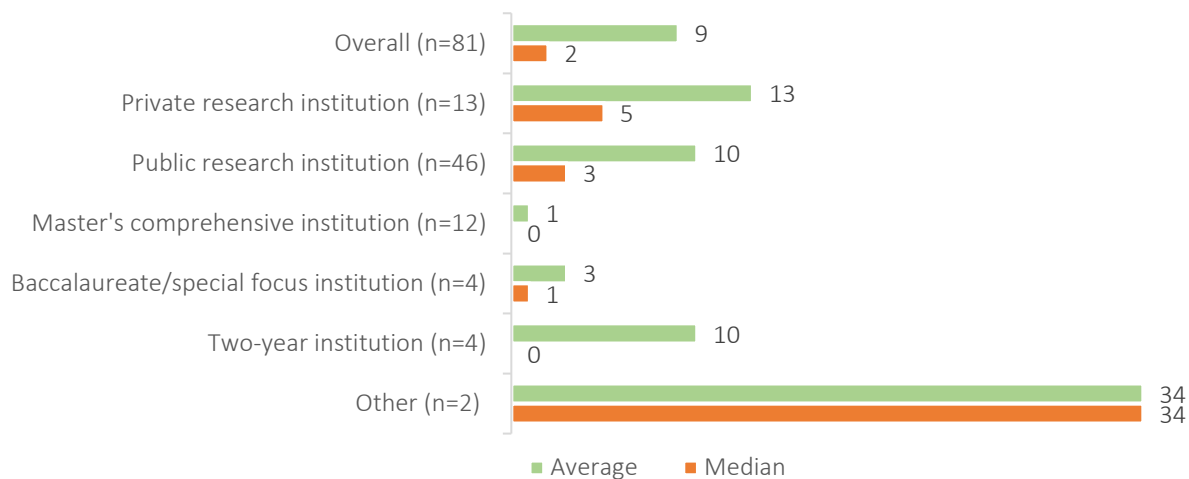
Instructional Design

Eighty percent of two-year institutions have an online unit that supports the institution's centralized instructional design team, followed by 67% of master's comprehensive institutions, 55% of public research institutions, and 35% of private research institutions.

Figure 63: What is the instructional design model that your online unit employs for the development of online programs? Please select all that apply. By Institution Type


- Our online unit supports the institution's centralized instructional design team
- Our online unit leverages a centralized instructional design team located elsewhere on campus
- Our online unit leverages instructional design teams from other academic units
- Other

## Faculty Professional Development, Compensation, and Load

All institution types have full-time faculty (92%) and adjunct faculty (86%) teaching in their online programs.

Figure 64: Who teaches in your online programs? Please select all that apply. By Institution Type
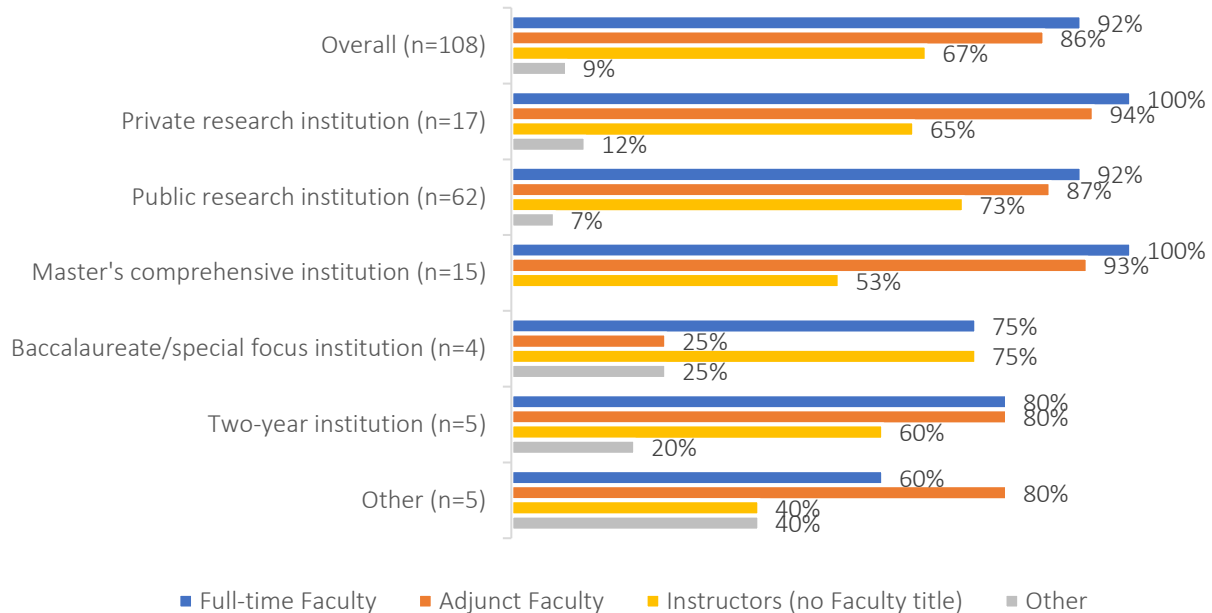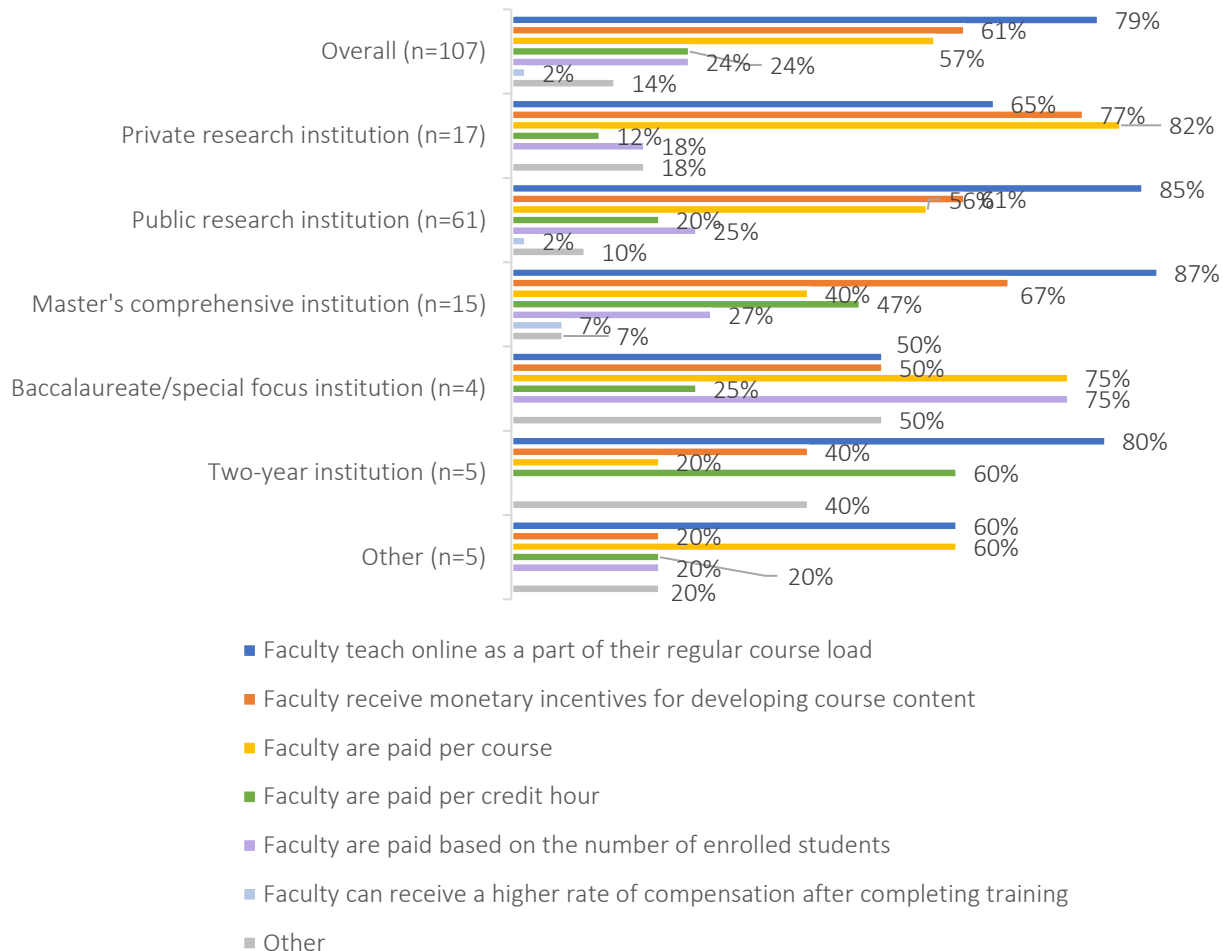

Legend: ■ Full-time Faculty ■ Adjunct Faculty ■ Instructors (no Faculty title) ■ Other

Two-year institutions are the most likely to require online instructors to attend training or achieve proficiencies prior to teaching online (80%), followed by private research institutions (59%), public research institutions (53%), and baccalaureate/special focus institutions (50%). Sixty percent of master's comprehensive institutions do not have this requirement.

Figure 65: Are your online instructors required to attend training or achieve proficiencies prior to teaching online? By Institution Type


Legend: ■ Yes ■ No ■ Not sure
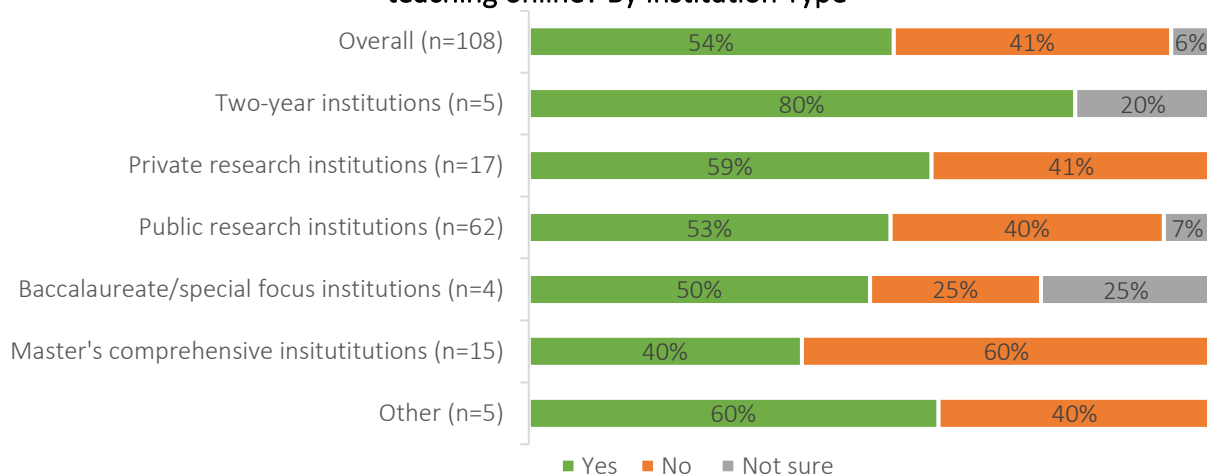
For master's comprehensive institutions (87%), public research institutions (85%), and two-year institutions (80%), faculty are most likely to teach online as a part of their regular course load, while those from private research institutions (82%) are most likely to be paid per course.

Figure 66: How are the faculty teaching in your online programs compensated? Please select all that apply. By Institution Type

Legend:
- ■ Faculty teach online as a part of their regular course load
- ■ Faculty receive monetary incentives for developing course content
- ■ Faculty are paid per course
- ■ Faculty are paid per credit hour
- ■ Faculty are paid based on the number of enrolled students
- ■ Faculty can receive a higher rate of compensation after completing training
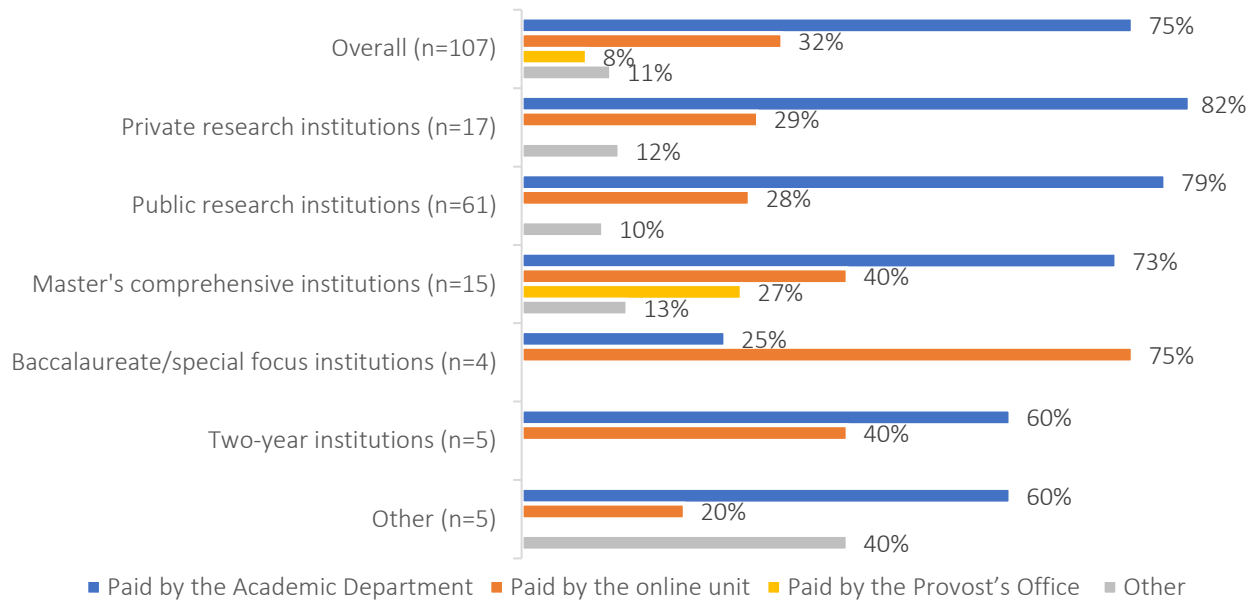- ■ Other

For eighty percent of two-year institutions, online courses are discretionary, depending either on faculty preference, department or college needs, followed by 71% of private research institutions, 64% of public research institutions, and 50% of baccalaureate/special focus institutions.

Figure 67: Are online courses considered part of load / faculty contractual workload or overload? By Institution Type

- Is discretionary, can be either depending on faculty preference, department or college needs
- Part of load
- Overload
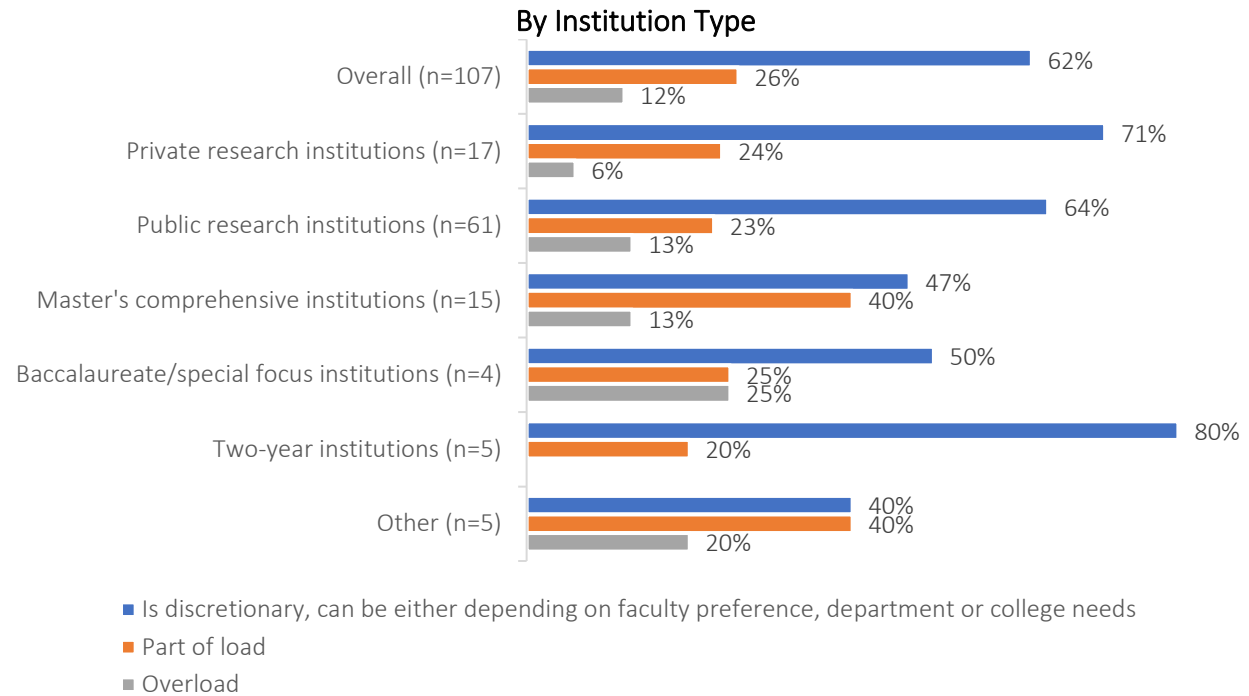
Eighty-two percent of private research institutions fund instructors' salaries through the academic department, followed by 79% of public research institutions, and 73% of master's comprehensive institutions. Three of the four baccalaureate/special focus institutions (75%) fund instructors' salaries through their online unit.

Figure 68: How are the salaries for instructors funded? Please select all that apply. By Institution Type


Legend: ■ Paid by the Academic Department ■ Paid by the online unit ■ Paid by the Provost's Office ■ Other

Overall (n=107): Academic Department 75%, online unit 32%, Provost's Office 8%, Other 11%
Private research institutions (n=17): Academic Department 82%, online unit 29%, Other 12%
Public research institutions (n=61): Academic Department 79%, online unit 28%, Other 10%
Master's comprehensive institutions (n=15): Academic Department 73%, online unit 40%, Provost's Office 27%, Other 13%
Baccalaureate/special focus institutions (n=4): Academic Department 25%, online unit 75%
Two-year institutions (n=5): Academic Department 60%, online unit 40%
Other (n=5): Academic Department 60%, online unit 20%, Other 40%

Contracted Services

Private research institutions are the only institution type more likely to say their online unit contracts for services (53%), while other institution types are more likely to say their online unit does not contract for services.

Figure 69: Does your online education unit contract for services, often provided by an online program manager (OPM) organization? By Institution Type
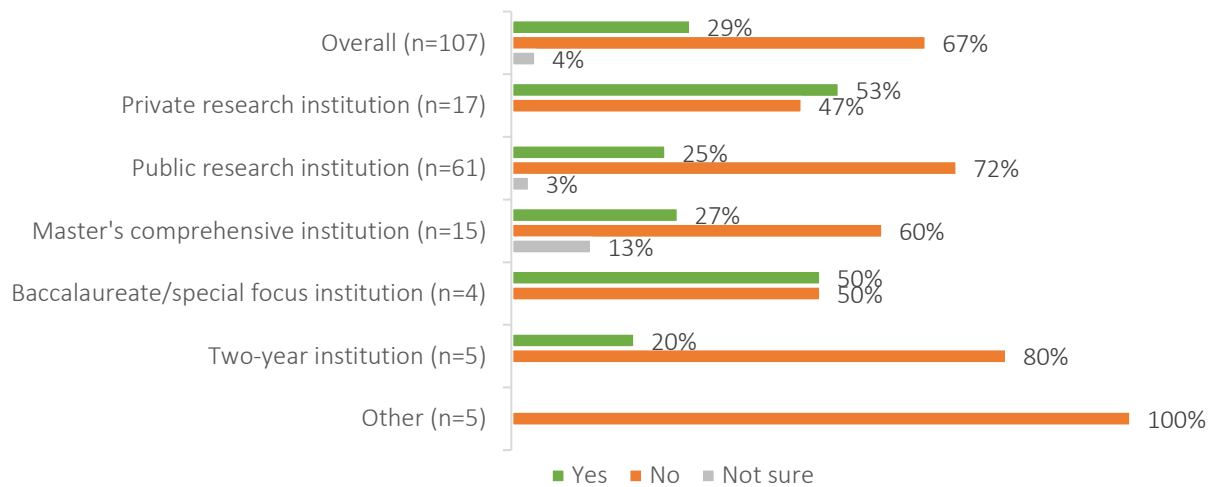

Among private research institutions, public research institutions, and master's comprehensive institutions, the most common use of outside vendors is for marketing and recruiting purposes.

Figure 70: Which of the following is your online education unit using outside vendors for? Please select all that apply. By Institution Type
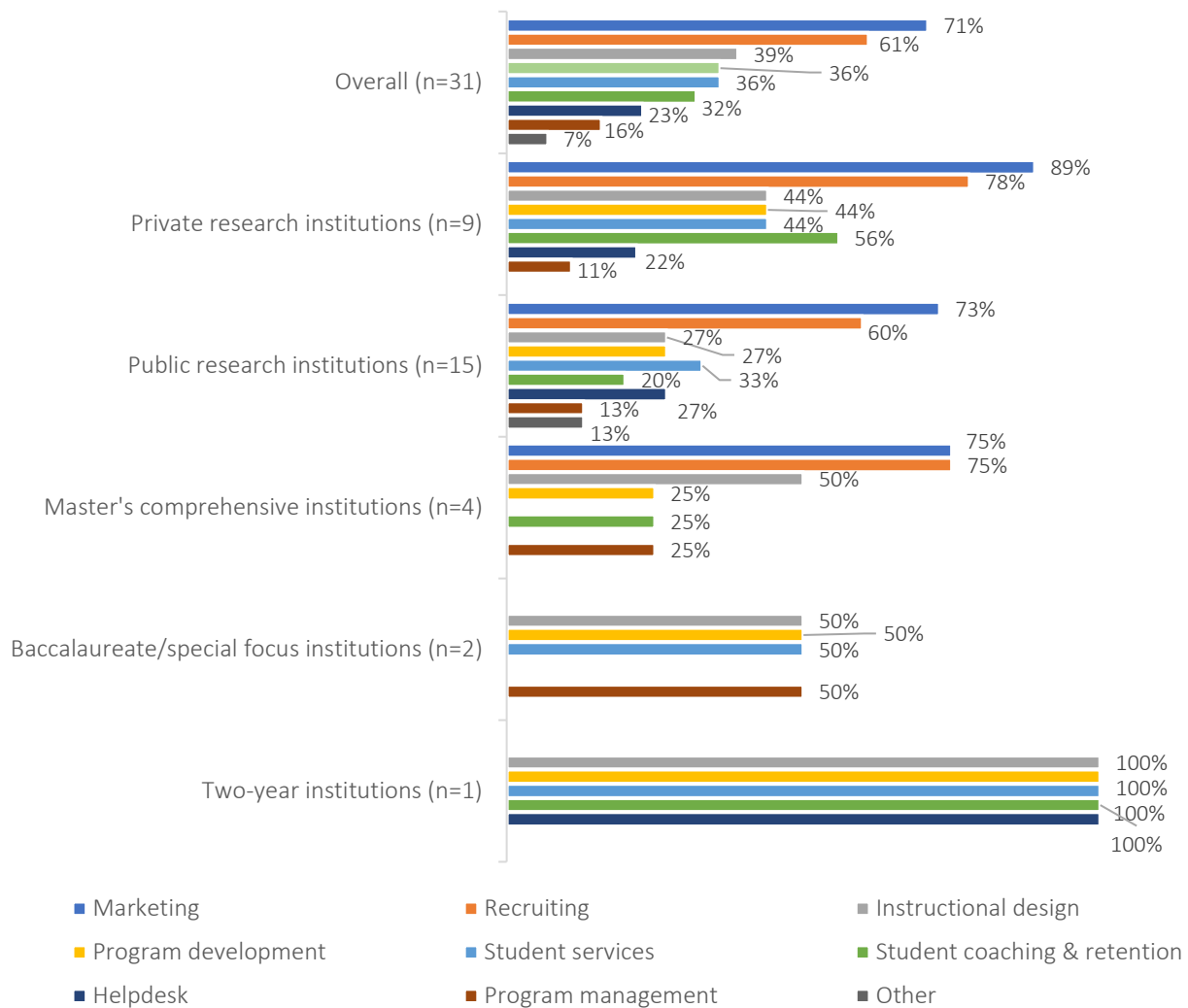
Master's comprehensive, private research, and two-year institutions are more likely to use tuition-share to compensate outside vendors, while public research institutions are slightly more likely to pay a fee for service.
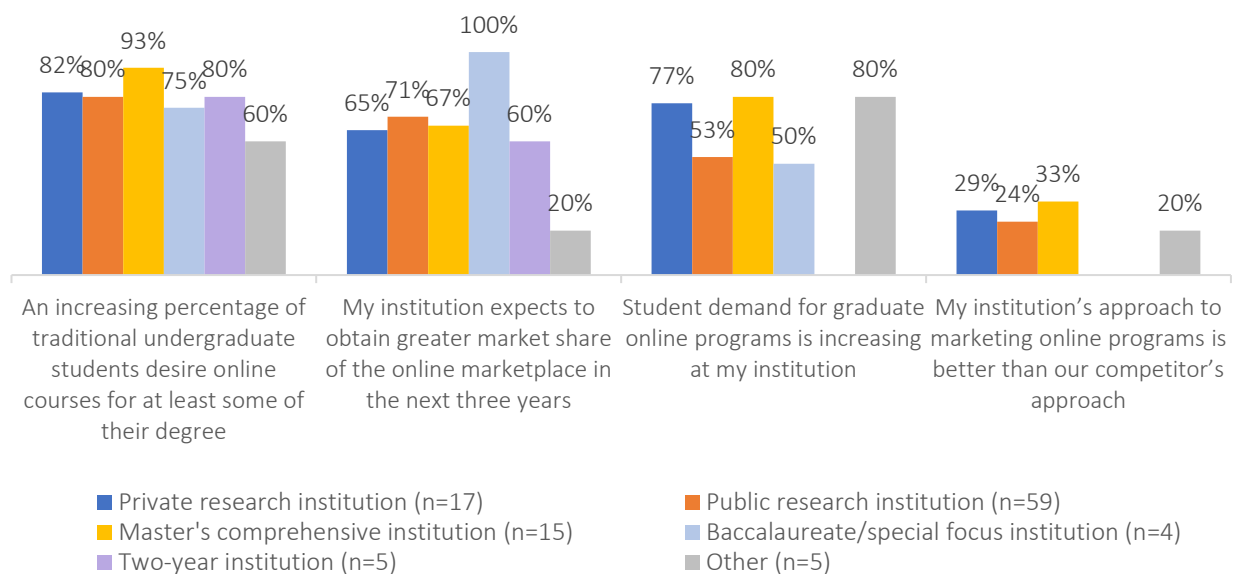
Figure 71: Which of the following best describes how your online unit compensates outside vendors? Please select all that apply. By Institution Type
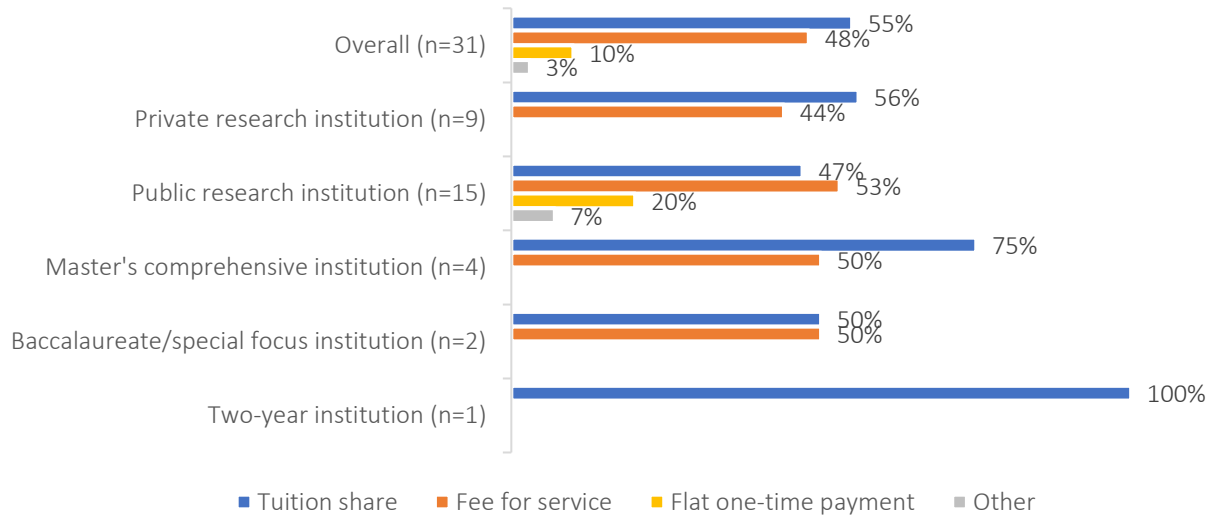
Growth in Online Demand

Respondents from most institution types are most likely to strongly agree or agree that an increasing percentage of traditional undergraduate students desire online courses for at least some of their degree, while respondents from baccalaureate/special focus institutions are most likely to agree that their institution expects to obtain greater market share of the online marketplace in the next three years. Notably, across the board, those than felt their institution's approach to marketing online programs was better than their competitors were in the minority.

Figure 72: Please rate how strongly you agree or disagree with the following statements (% Strongly Agree or Agree) By Institution Type

Unit Location: Responses and Analysis

Key Findings

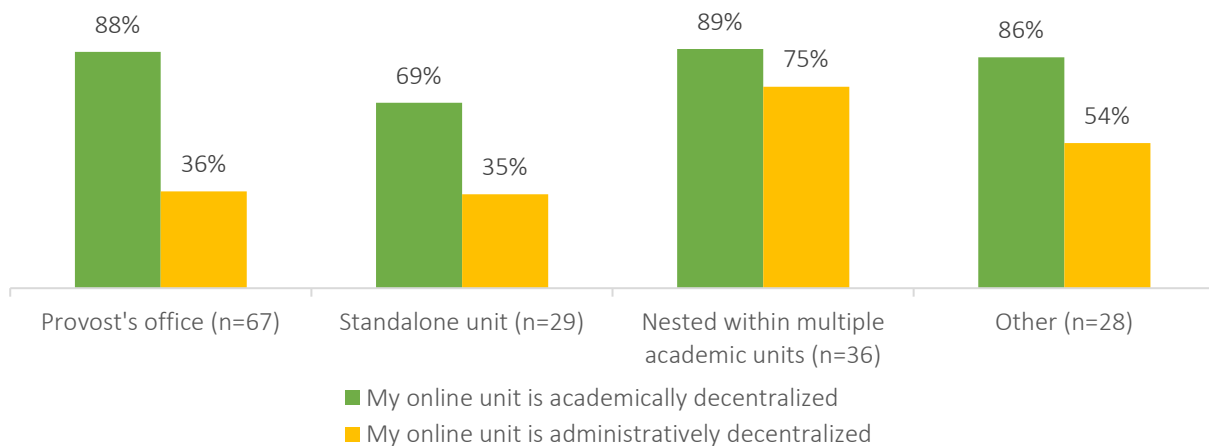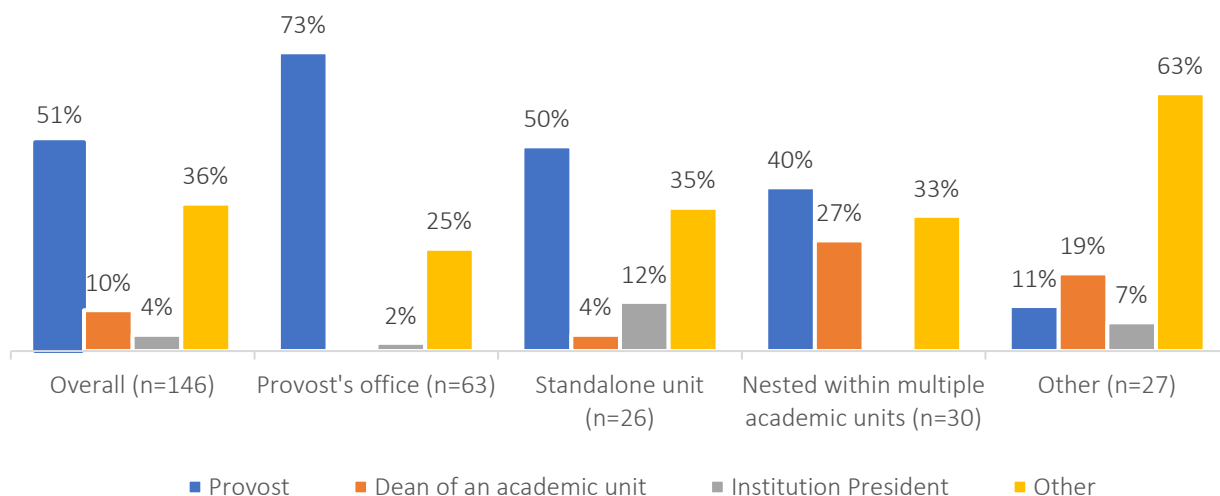|	
Provost's Office	• Online education units located in the provost's office have the **highest average total budget** for their online unit **($9.9M).** • Units in the provost's office are the **most likely** to say their online unit s**upports the institution's centralized instructional design team (70%)**, higher than the **average (52%).** • These units are **significantly more likely** to say **instruction salaries** are **paid by the academic department (83%).** • These units are **least likely** to say they **contract for services (26%).** • These units primarily only use outside vendors for **marketing** and **recruiting.**
Standalone Units	• As expected, standalone units are the **least likely** to say their online unit **is academically decentralized (69%)**, and **administratively decentralized (35%).** • **Over half (55%)** of standalone units have a **revenue share model** in which online programs are divided between multiple units or entities, higher than the **overall average (35%).** • Standalone units are **most likely** to say they are **paid by the online unit (45%).**
Nested Within Multiple Academic Units	• As expected, online units that are nested within multiple academic units are the **most likely** to say their online unit is **administratively decentralized (75%).** • These units have the **lowest average total budget** for their online unit **($5.7M).** • These units have the **lowest average** number of full-time or FTE employees **funded by their online unit (18),** and the **highest average** number of full-time/FTE employees **funded outside of the online unit's budget (14).** • These units are **most likely** to say they **contract for services (40%).** • These units are **more likely** to say they **use outside vendors for nearly all purposes.**

Administrative and Academic Organization

Online education units in the provost's office and standalone units are significantly more likely to say they are academically decentralized than administratively decentralized. Units nested within multiple academic units are slightly more likely to cite academic decentralization than administrative decentralization.

Figure 73: Please rate how strongly you agree or disagree with the following statements (% Strongly Agree or Agree) By Unit Location

- My online unit is academically decentralized
- My online unit is administratively decentralized

Provost's office (n=67): 88% / 36%
Standalone unit (n=29): 69% / 35%
Nested within multiple academic units (n=36): 89% / 75%
Other (n=28): 86% / 54%

Not surprisingly, online units that reside in the Provost's office most often have COLOs that report to the provost (70%). Standalone units (40%) and units nested within multiple academic units (40%) were also more likely to report to the Provost than any other reporting line.
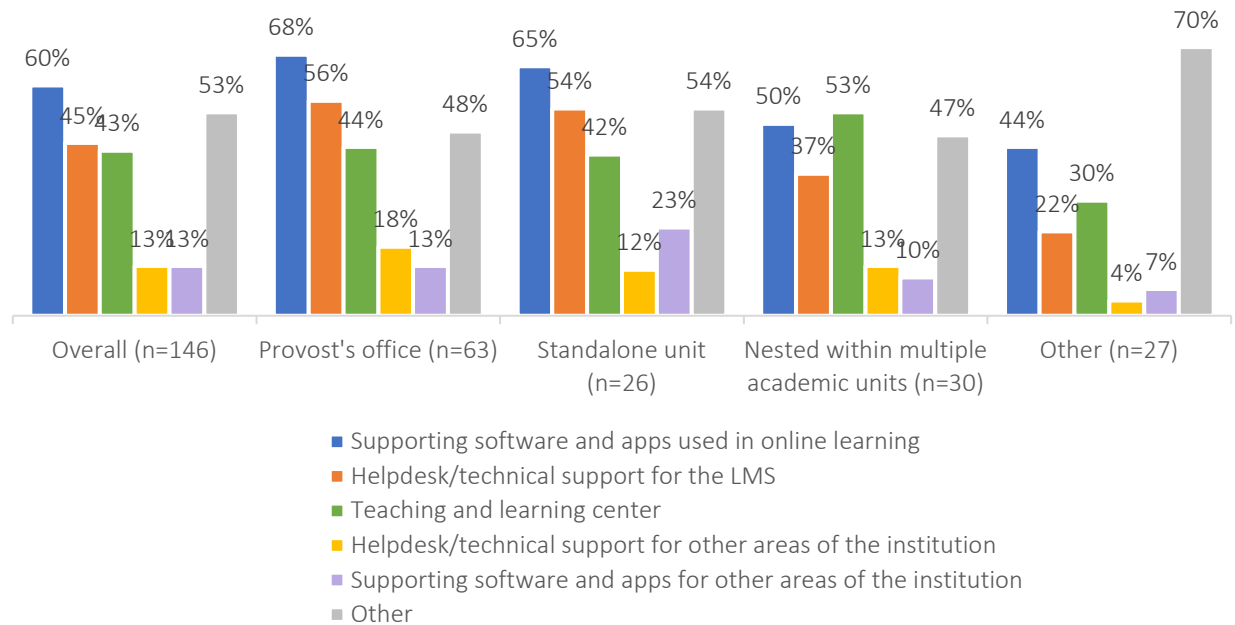
Figure 74: Who does the Chief Online Learning Officer (COLO) primarily report to? If the COLO has multiple reporting lines, inclusive of dotted lines, please choose "other" and describe the reporting relationships. By Unit Location

- Provost
- Dean of an academic unit
- Institution President
- Other

Overall (n=146): 51%, 10%, 4%, 36%
Provost's office (n=63): 73%, 2%, 25%
Standalone unit (n=26): 50%, 4%, 12%, 35%
Nested within multiple academic units (n=30): 40%, 27%, 33%
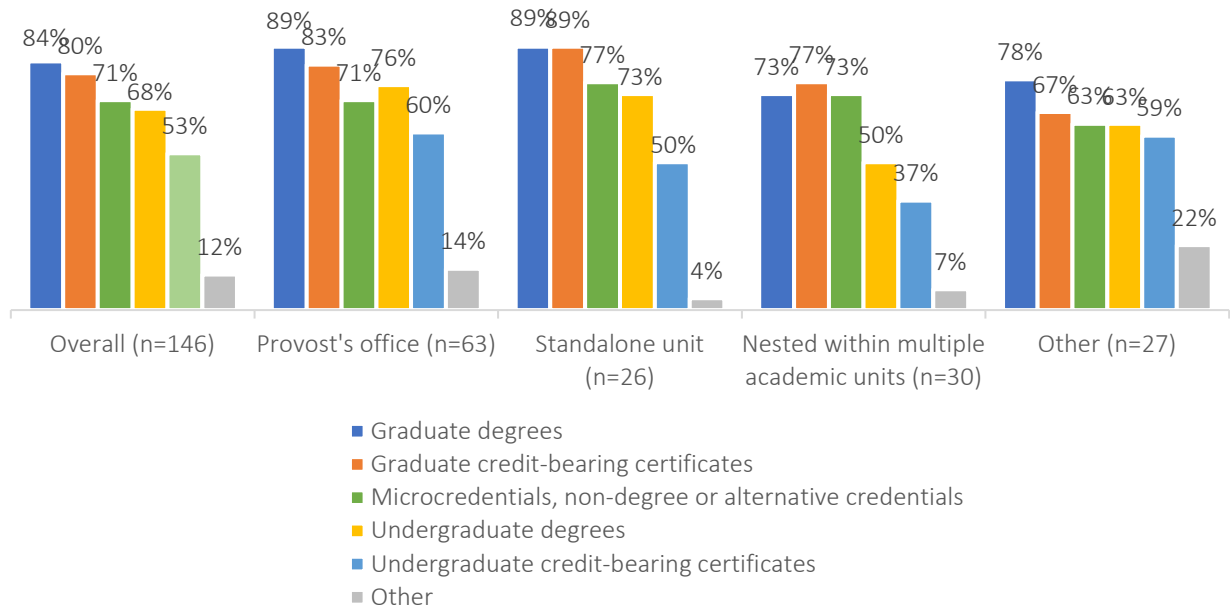Other (n=27): 11%, 19%, 7%, 63%

Services and Portfolio

Standalone units and online education units that are in the Provost's office are most likely to cite supporting software and apps used in online learning as a responsibility, while units that are nested within multiple academic units are most likely to cite the teaching and learner center as a unit responsibility.

Figure 75: Which of the following are responsibilities for your online education unit? Please select all that apply. By Unit Location

Legend:
- ■ Supporting software and apps used in online learning
- ■ Helpdesk/technical support for the LMS
- ■ Teaching and learning center
- ■ Helpdesk/technical support for other areas of the institution
- ■ Supporting software and apps for other areas of the institution
- ■ Other

Units located in the provost's office are slightly more likely to support graduate degrees (89%), while units nested within multiple academic units are slightly more likely to support graduate credit-bearing certificates (77%). Standalone units are equally as likely to support graduate degrees (89%) and graduate credit-bearing certificates (89%).

Figure 76: Which of the following program types are included in your online unit's portfolio of programs that it supports? Please select all that apply. By Unit Location

- Graduate degrees
- Graduate credit-bearing certificates
- Microcredentials, non-degree or alternative credentials
- Undergraduate degrees
- Undergraduate credit-bearing certificates
- Other

Budget and Revenue

Online education units located in the provost's office had the highest average total budget ($9.9M), followed by standalone units ($8.1M), and units that are nested within multiple academic units ($5.7M).

Figure 77: For the 2022-2023 academic year, what was your online unit's total budget? Please list the budget in USD. By Unit Location
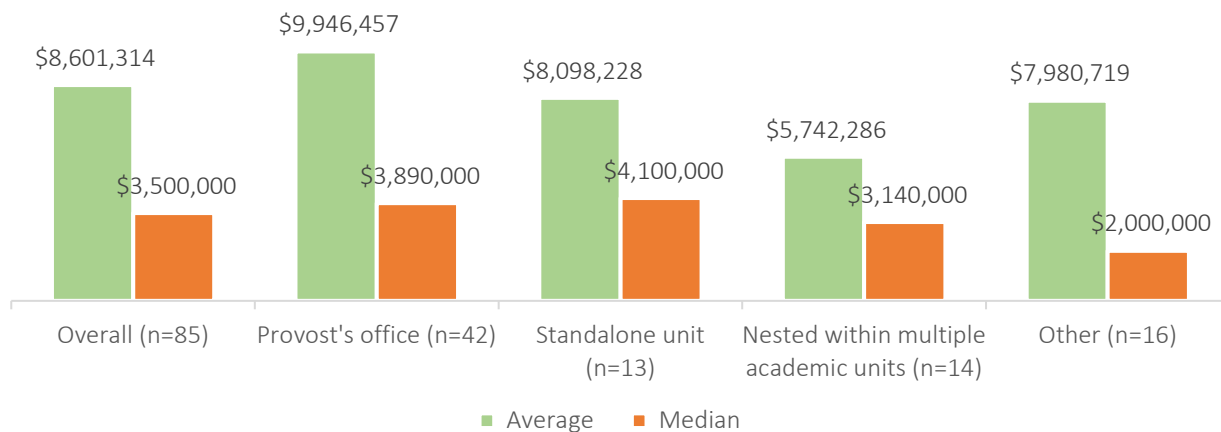
- Average
- Median

The average online unit total gross revenue for standalone units is $21.3M, followed by units located in the provost's office ($20.8M), and units nested within multiple academic units ($13.2M).

Figure 78: For the 2022-2023 academic year, what was your online unit's total *gross* revenue? Please list gross revenue in USD. By Unit Location
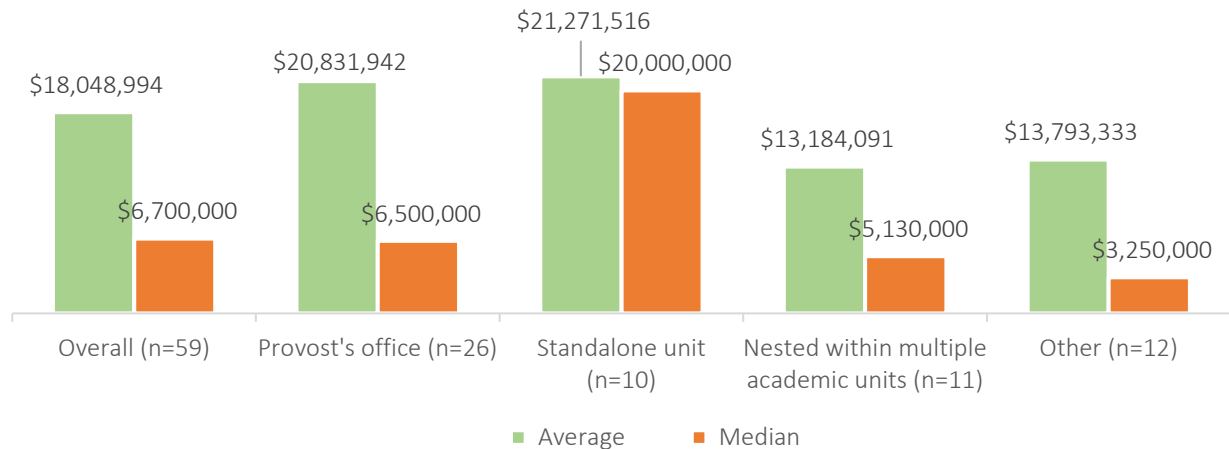
Financial Models

Over half (55%) of standalone units have a revenue share model in which online program revenue is divided between multiple units or entities, while 44% of units in the provost's office and 44% of units that are nested within multiple academic units listed financial models included in the "Other" category.

Figure 79: Which of the following best describes your online unit's financial model? By Unit Location
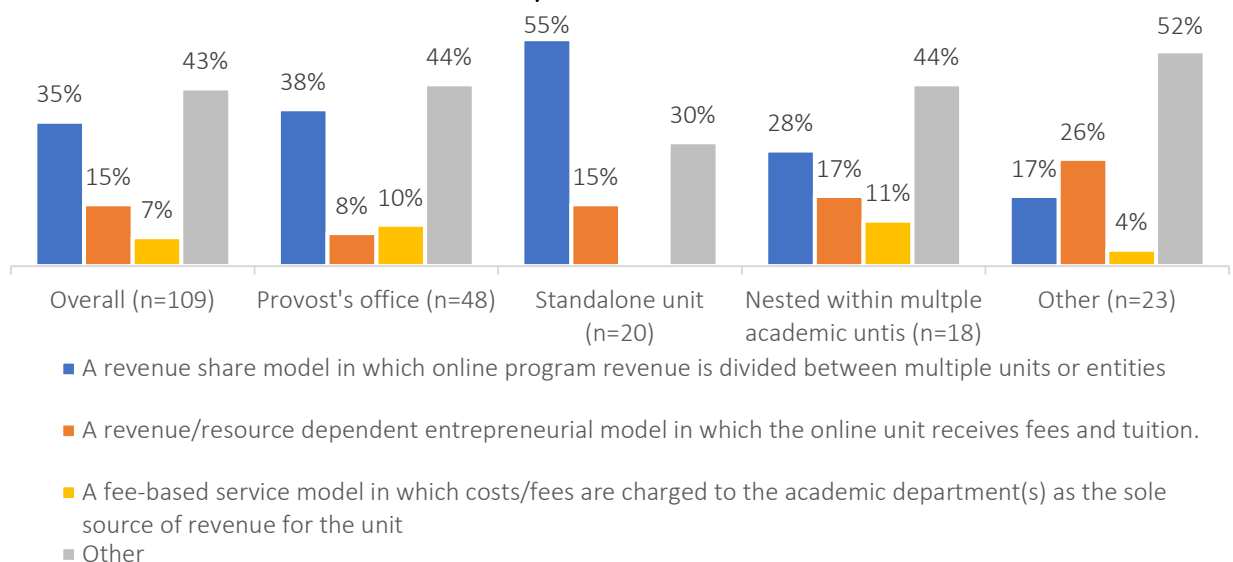
Staffing

Standalone units and online education units that are in the Provost's office have an average number of 39 full-time or FTE employees funded by their online unit, while units that are nested within multiple academic units have about half the number of full-time or FTE employees (18).

Figure 80: Including yourself, how many full-time or full-time equivalent (FTE) employees (i.e., two half-time employees equal one full-time employee) are funded by your online unit? By Unit Location
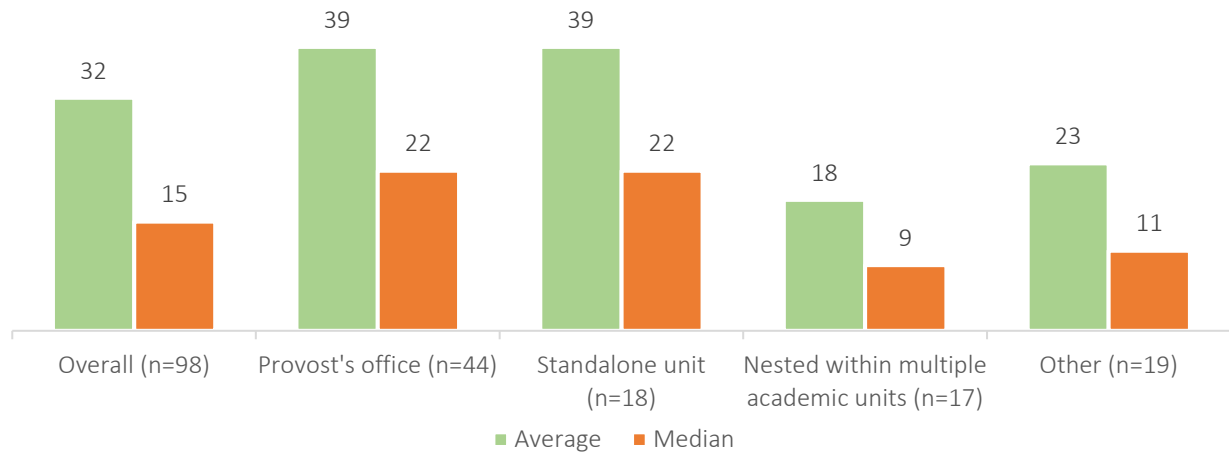
On average, online education units that are nested within multiple academic units have 14 full-time or FTE employees that are involved in online learning but funded outside of the online unit's budget, followed by units in the provost's office (11), and standalone units (5).
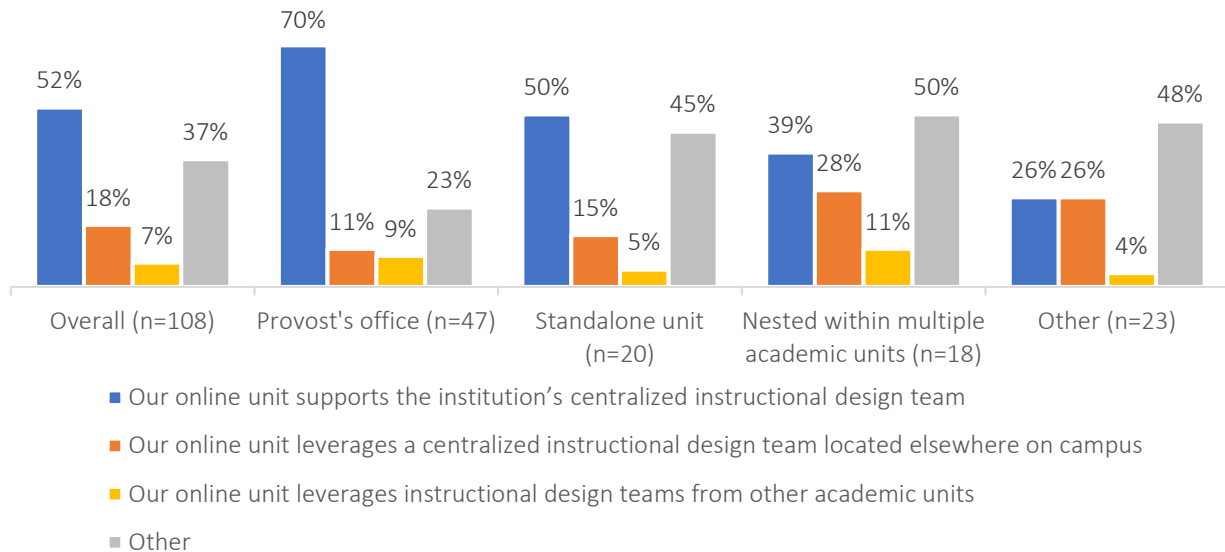
Figure 81: How many full-time or full-time equivalent (FTE) employees that are involved in online learning but are funded outside of the online unit's budget? By Unit Location
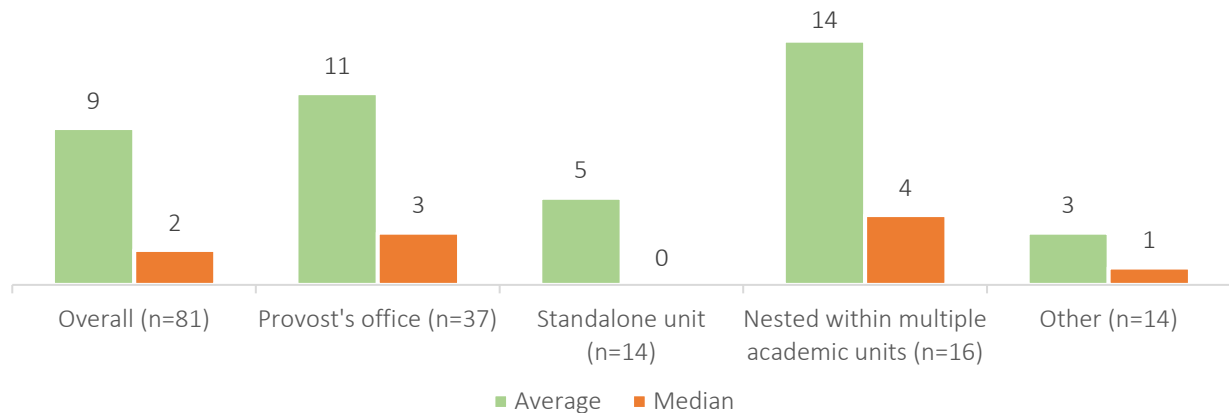
Instructional Design

In total, 70% of units that are located in the provost's office support the institution's centralized instructional design team, followed by 50% of standalone units, and 39% of units that are nested within multiple academic units. Twenty-eight percent of units nested within multiple academic units leverage a centralized instructional design team located elsewhere on campus.
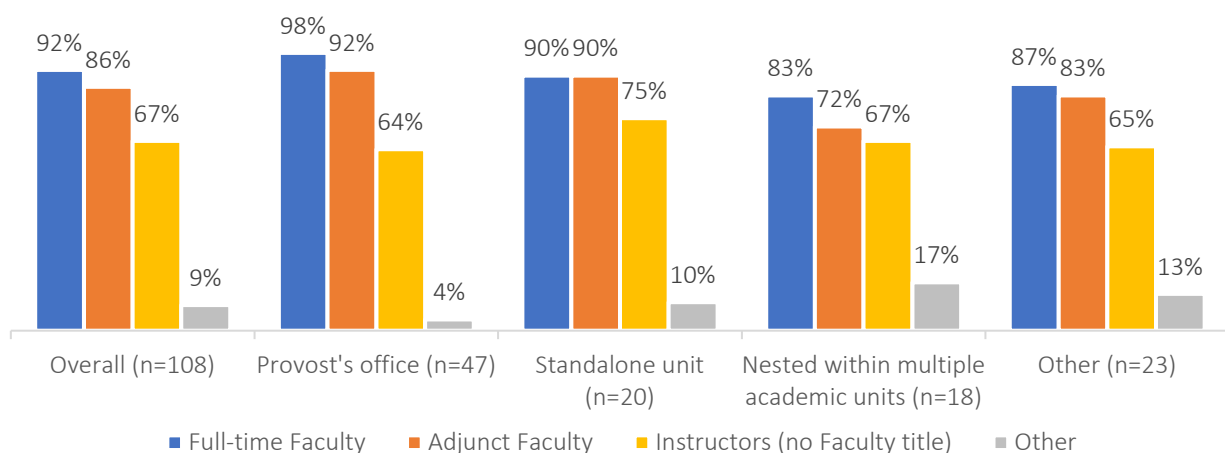
Figure 82: What is the instructional design model that your online unit employs for the development of online programs? Please select all that apply. By Unit Location

Legend:
- Our online unit supports the institution's centralized instructional design team
- Our online unit leverages a centralized instructional design team located elsewhere on campus
- Our online unit leverages instructional design teams from other academic units
- Other

	Overall (n=108)	Provost's office (n=47)	Standalone unit (n=20)	Nested within multiple academic units (n=18)	Other (n=23)
Supports centralized ID team	52%	70%	50%	39%	26%
Leverages centralized ID team elsewhere	18%	11%	15%	28%	26%
Leverages ID teams from other academic units	7%	9%	5%	11%	4%
Other	37%	23%	45%	50%	48%

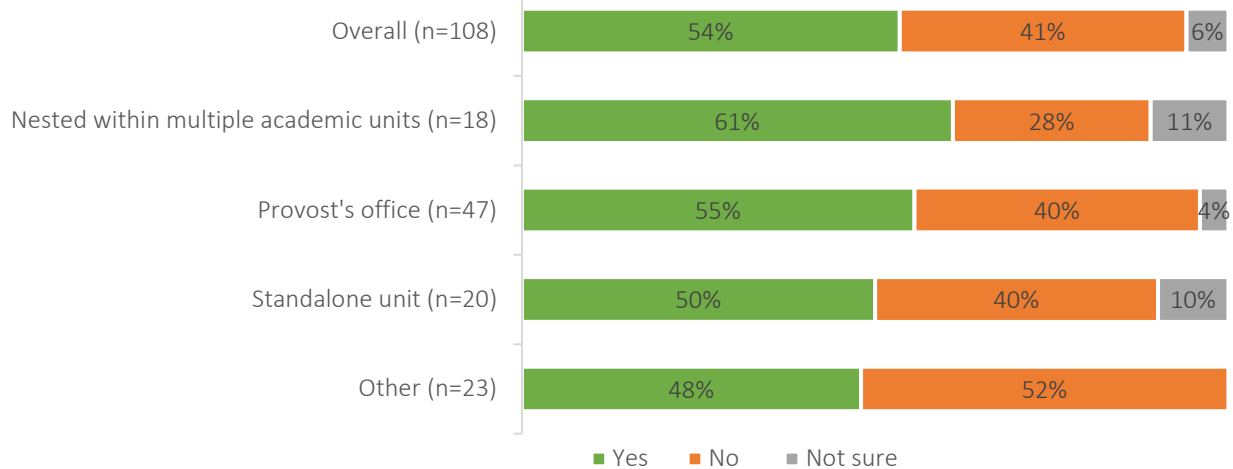## Faculty Professional Development, Compensation, and Load

Among all online education unit locations, full-time faculty and adjunct faculty are the most common types of online program instructors.

Figure 83: Who teaches in your online programs? Please select all that apply. By Unit Location

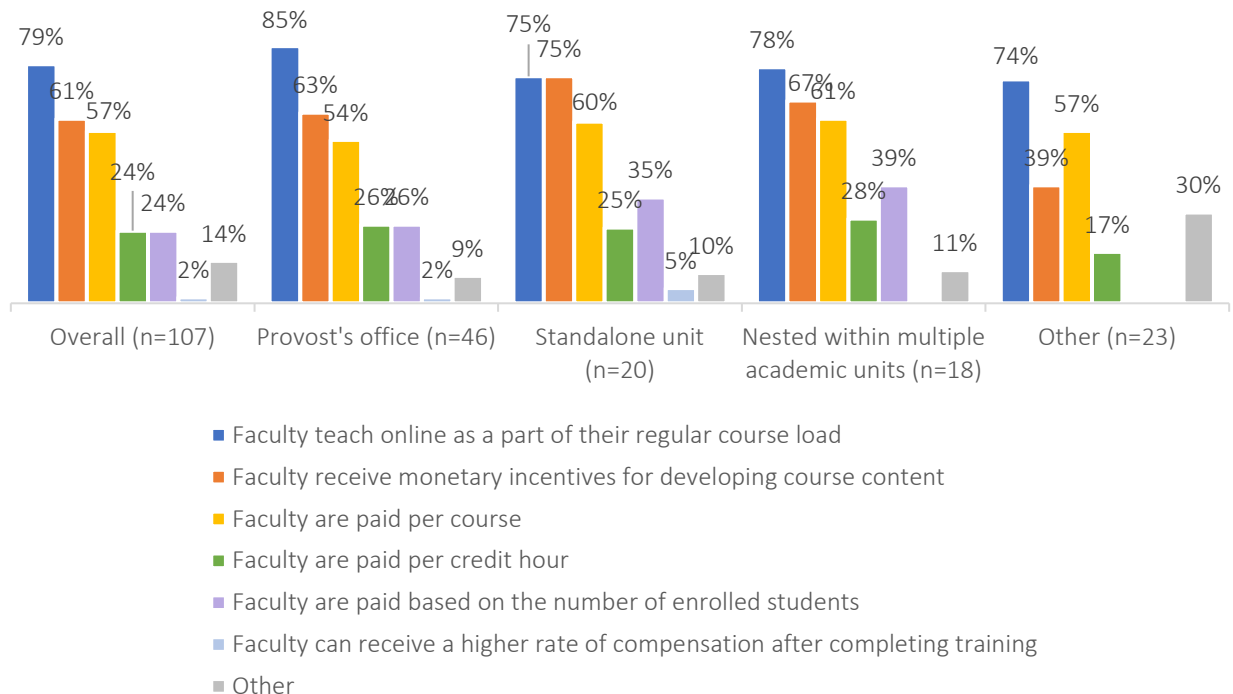|	Overall (n=108)	Provost's office (n=47)	Standalone unit (n=20)	Nested within multiple academic units (n=18)	Other (n=23)
Full-time Faculty	92%	98%	90%	83%	87%
Adjunct Faculty	86%	92%	90%	72%	83%
Instructors (no Faculty title)	67%	64%	75%	67%	65%
Other	9%	4%	10%	17%	13%

Sixty-one percent of online education units that are nested within multiple academic units require online instructors to attend training or achieve proficiencies prior to teaching online, followed by 55% of units located in the provost's office, and half (50%) of standalone units.

Figure 84: Are your online instructors required to attend training or achieve proficiencies prior to teaching online? By Unit Location

| Unit Location	Yes	No	Not sure
Overall (n=108)	54%	41%	6%
Nested within multiple academic units (n=18)	61%	28%	11%
Provost's office (n=47)	55%	40%	4%
Standalone unit (n=20)	50%	40%	10%
Other (n=23)	48%	52%	

■ Yes ■ No ■ Not sure

Online education units that are located in the provost's office, standalone units, and units nested within multiple academic units are all most likely to say that faculty are compensated by teaching online as a part of their regular course load.

Figure 85: How are the faculty teaching in your online programs compensated? Please select all that apply. By Unit Location

	Overall (n=107)	Provost's office (n=46)	Standalone unit (n=20)	Nested within multiple academic units (n=18)	Other (n=23)
Faculty teach online as a part of their regular course load	79%	85%	75%	78%	74%
Faculty receive monetary incentives for developing course content	61%	63%	75%	67%	39%
Faculty are paid per course	57%	54%	60%	61%	57%
Faculty are paid per credit hour	24%	26%	25%	28%	17%
Faculty are paid based on the number of enrolled students	24%	26%	35%	39%	
Faculty can receive a higher rate of compensation after completing training	2%	2%	5%		
Other	14%	9%	10%	11%	30%

■ Faculty teach online as a part of their regular course load
■ Faculty receive monetary incentives for developing course content
■ Faculty are paid per course
■ Faculty are paid per credit hour
■ Faculty are paid based on the number of enrolled students
■ Faculty can receive a higher rate of compensation after completing training
■ Other

Two-thirds (67%) of online education units nested within multiple academic units said online courses are discretionary and can be either in-load or overload depending on faculty preference, department or college needs, followed by 63% of units in the provost's office, and 60% of standalone units.

Figure 86: Are online courses considered part of load / faculty contractual workload or overload? By Unit Location

- Is discretionary, can be either depending on faculty preference, department or college needs
- Part of load
- Overload
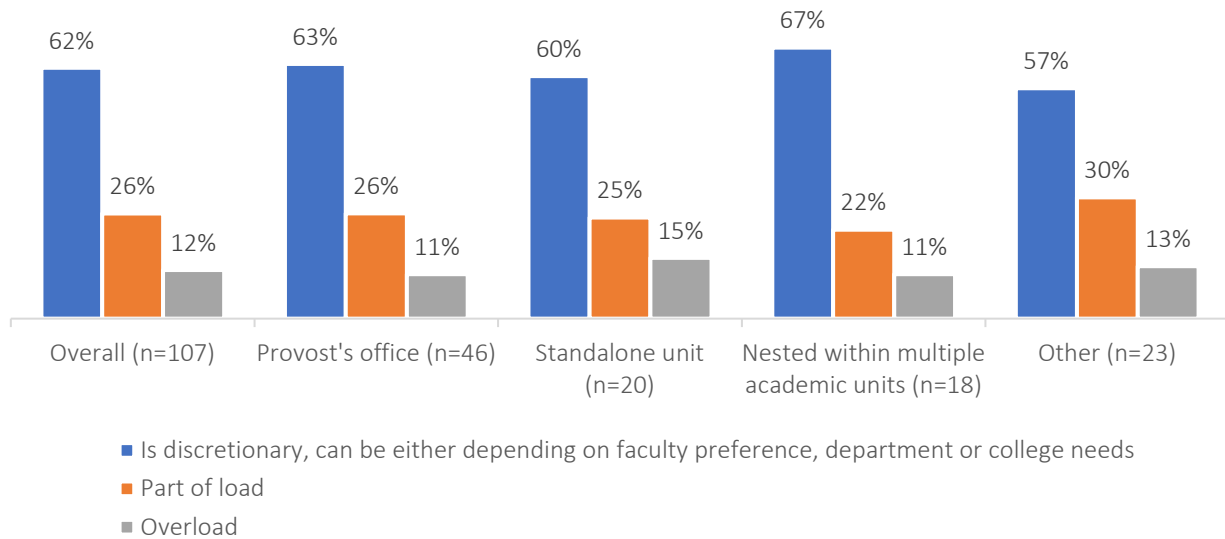
Eighty-three percent of online education units located in the provost's office fund instruction salaries through the academic department, followed by 78% of units nested within multiple academic units, and 55% of standalone units.

Figure 87: How are the salaries for instruction funded? Please select all that apply. By Unit Location

- Paid by the Academic Department
- Paid by the online unit
- Paid by the Provost's Office
- Other
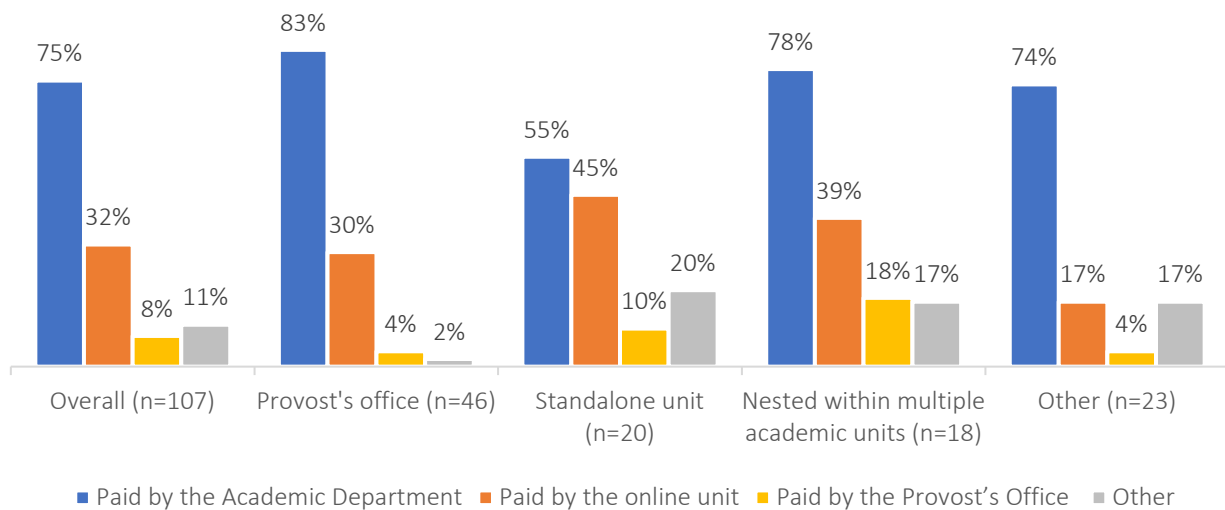
Contracted Services

Forty percent of online education units that are nested within multiple academic units said their online education unit does contract for services, followed by 35% of standalone units, and 26% of units in the provost's office.

Figure 88: Does your online education unit contract for services, often provided by an online program manager (OPM) organization? By Unit Location
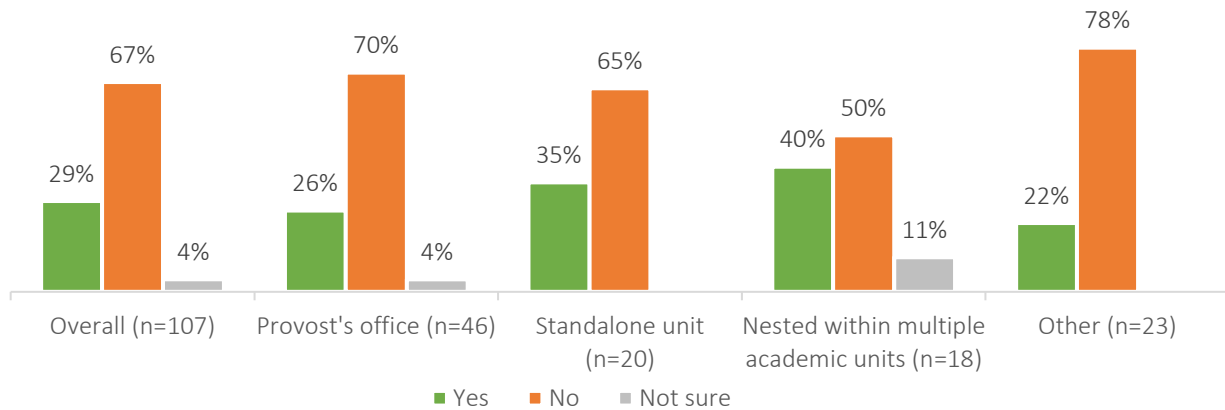

The most common purpose of using outside vendors is for marketing among all locations for online education units.

Figure 89: Which of the following is your online education unit using outside vendors for? Please select all that apply. By Unit Location
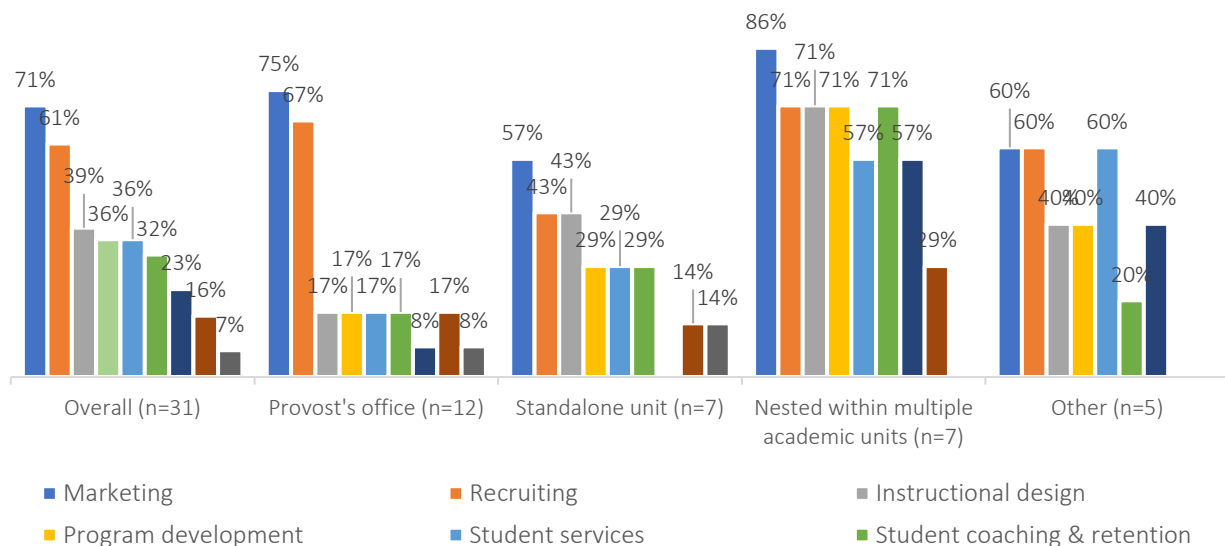
Online education units that are nested within multiple academic units are more likely to use tuition share to compensate outside vendors (86%), while units in the provost's office are more likely to pay a fee for services (67%).

Figure 90: Which of the following best describes how your online unit compensates outside vendors? Please select all that apply. By Unit Location

- Tuition share
- Fee for service
- Flat one-time payment
- Other
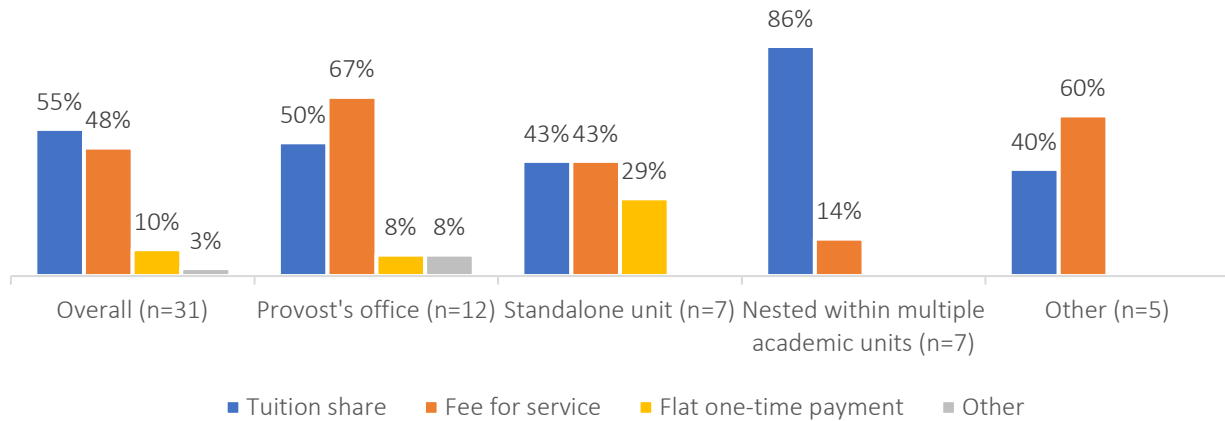
Growth in Online Demand

Online education units in all locations are most likely to strongly agree or agree that an increasing percentage of traditional undergraduate students desire online courses for at least some of their degree, with units nested within multiple academic units the most likely to do so (89%).

Figure 91: Please rate how strongly you agree or disagree with the following statements (% Strongly Agree or Agree) By Unit Location

- Provost's office (n=45)
- Standalone unit (n=19)
- Nested within multiple academic units (n=18)
- Other (n=23)

Online Enterprise Annual Budget: Responses and Analysis

Key Findings

|	
Less than $1 Million	- Units that have a budget size under $1M were most likely to **strongly agree or agree** that their online unit is **academically decentralized (95%)** and **administratively decentralized (60%)**. - Units with budgets under $1M are **most likely** to support **graduate degrees (70%)** and **undergraduate degrees (70%)**. - These units are most likely to say their online **unit compensates outside vendors through tuition share (83%)**. - Those with a budget under $1M are most likely to **strongly agree or agree** that an **increasing percentage of traditional undergraduate students desire online courses** for at least some of their degree **(95%)**.
$1 Million to $3.49 Million	- Those with a budget between 1M - $3.49M are most likely to support **microcredentials, non-degree or alternative credentials (86%)**. - Units that have a budget size between 1M-$3.49M were most likely to say their **online instructors are required to attend training** or achieve proficiencies **prior to teaching online (57%)**. - When asked if their unit contracts for services, **38% of units with a budget between 1M - $3.49M said yes.**
$3.5 Million to $7.5 Million	- Units that have a budget between 3.5M-$7.5M have the **highest average number of full-time or FTE employees** that are **funded outside the unit (16)**. - Units with budgets between 3.5M - $7.5M are **most likely to support graduate credit-bearing certificates (86%)**. - These units were most likely to say **salaries for instruction are paid by the academic department (91%)**. - These units are most likely to say **online units compensate outside vendors with a fee for service (71%)**.
More than $7.5 Million	- Units with budgets over $7.5M are most likely to support **graduate degrees (86%)** and **graduate credit-bearing certificates (86%)**. - Units with a budget size over $7.5M have the **largest average gross revenue ($37.2M)**. **Nearly half (46%)** of these units have a revenue share model in which **online program revenue is divided between multiple units** or entities. - These units have the **largest average number of full-time/FTE employees funded by the unit (116)**. - Most likely to say their online unit **supports the institution's centralized instructional design team (62%)**. - Most likely to **strongly agree or agree** that their institution expects to **obtain greater market share of the online marketplace in the next three years (95%)**

Administrative and Academic Organization

Units that have a budget size under $1M were most likely to strongly agree or agree that their online unit is academically decentralized (95%) and administratively decentralized (60%).

Figure 92: Please rate how strongly you agree or disagree with the following statements (% Strongly Agree or Agree) By Budget Size
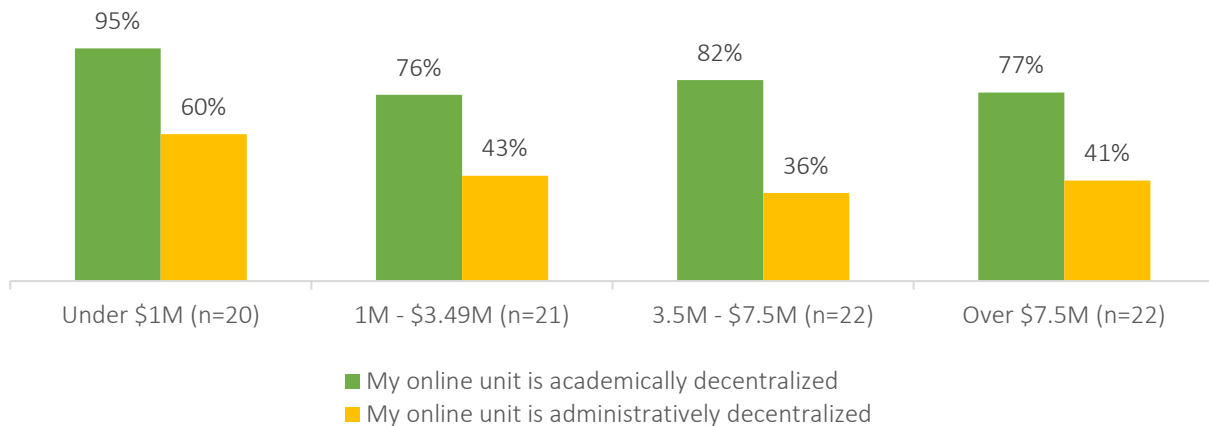
Units with a total budget of $1M or over were all most likely to say their COLO primarily reports to the provost, while units with a budget under $1M were most likely to choose the "Other" category when asked who their COLO reports to.
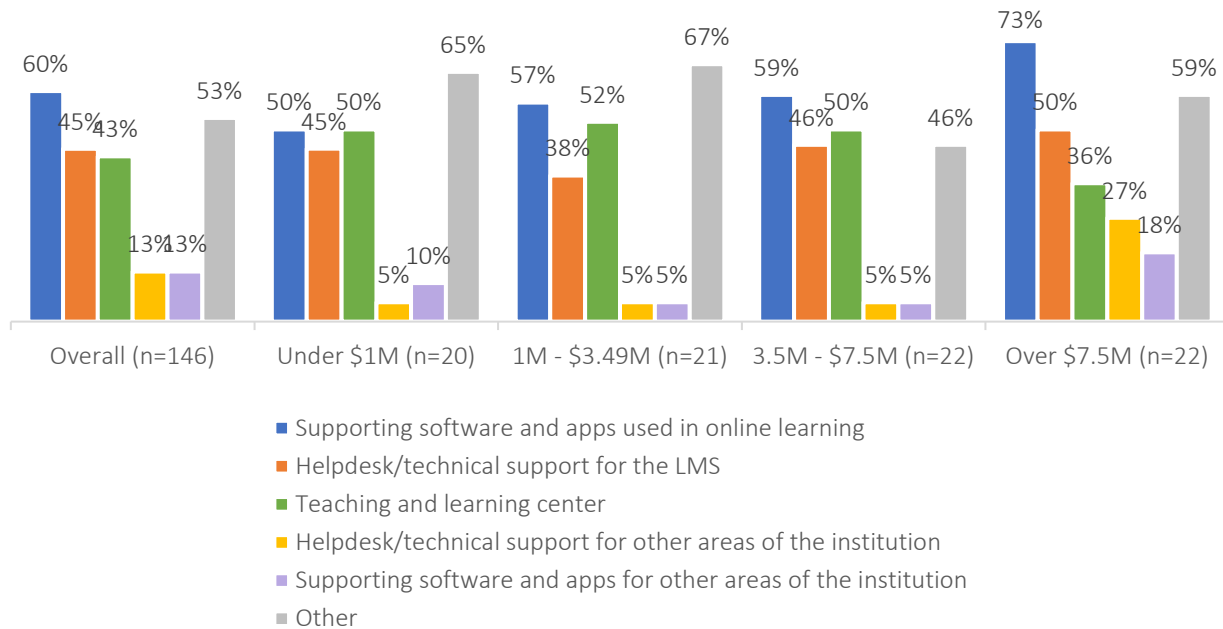
Figure 93: Who does the Chief Online Learning Officer (COLO) primarily report to? If the COLO has multiple reporting lines, inclusive of dotted lines, please choose "other" and describe the reporting relationships. By Budget Size
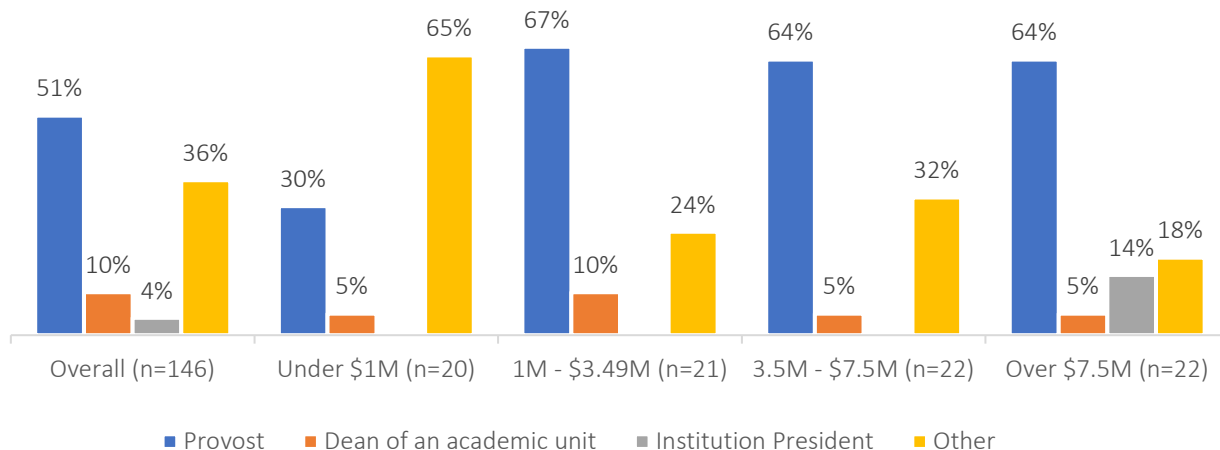
Services and Portfolio

Units of all budget sizes are most likely to cite supporting software and apps used in online learning as one of their responsibilities. Units with the largest budget size (over $7.5M) are more likely to cite most categories as a responsibility.

Figure 94: Which of the following are responsibilities for your online education unit? Please select all that apply. By Budget Size

- Supporting software and apps used in online learning
- Helpdesk/technical support for the LMS
- Teaching and learning center
- Helpdesk/technical support for other areas of the institution
- Supporting software and apps for other areas of the institution
- Other

Units with budgets under $1M are most likely to support graduate degrees (70%) and undergraduate degrees (70%), while those with a budget between 1M - $3.49M are most likely to support microcredentials, non-degree or alternative credentials (86%), budgets between 3.5M - $7.5M are most likely to support graduate credit-bearing certificates (86%), and those with budgets over $7.5M are most likely to support graduate degrees (86%) and graduate credit-bearing certificates (86%).
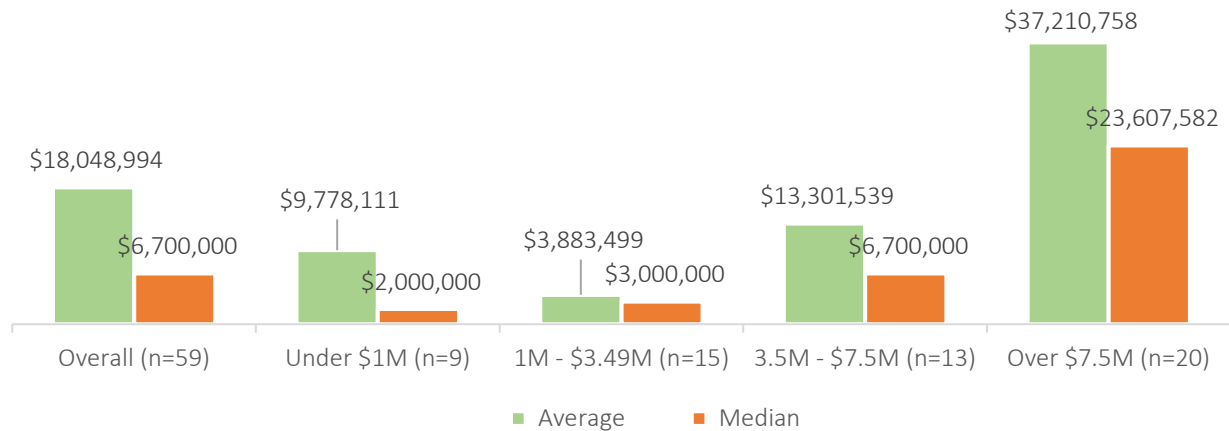
Figure 95: Which of the following program types are included in your online unit's portfolio of programs that it supports? Please select all that apply. By Budget Size

- ■ Graduate degrees
- ■ Graduate credit-bearing certificates
- ■ Microcredentials, non-degree or alternative credentials
- ■ Undergraduate degrees
- ■ Undergraduate credit-bearing certificates
- ■ Other
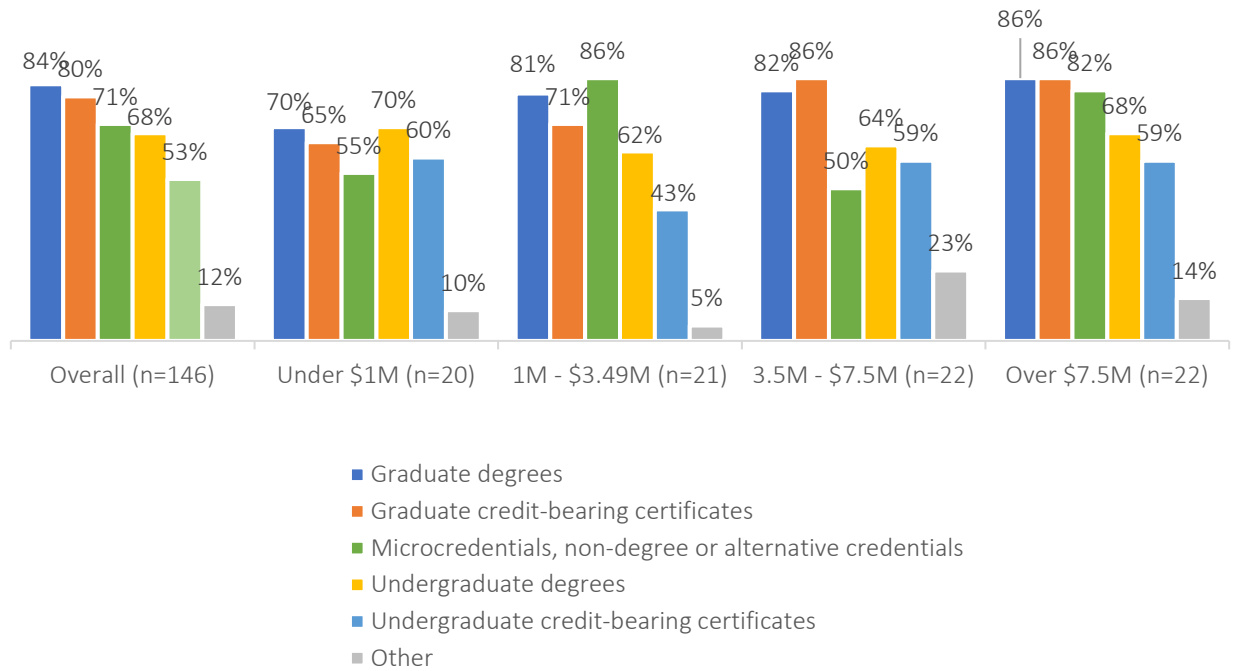
Revenue

Institutions with a budget size over $7.5M have an average gross revenue of $37.2M, while those with a budget under $1M have an average gross revenue of $9.8M.
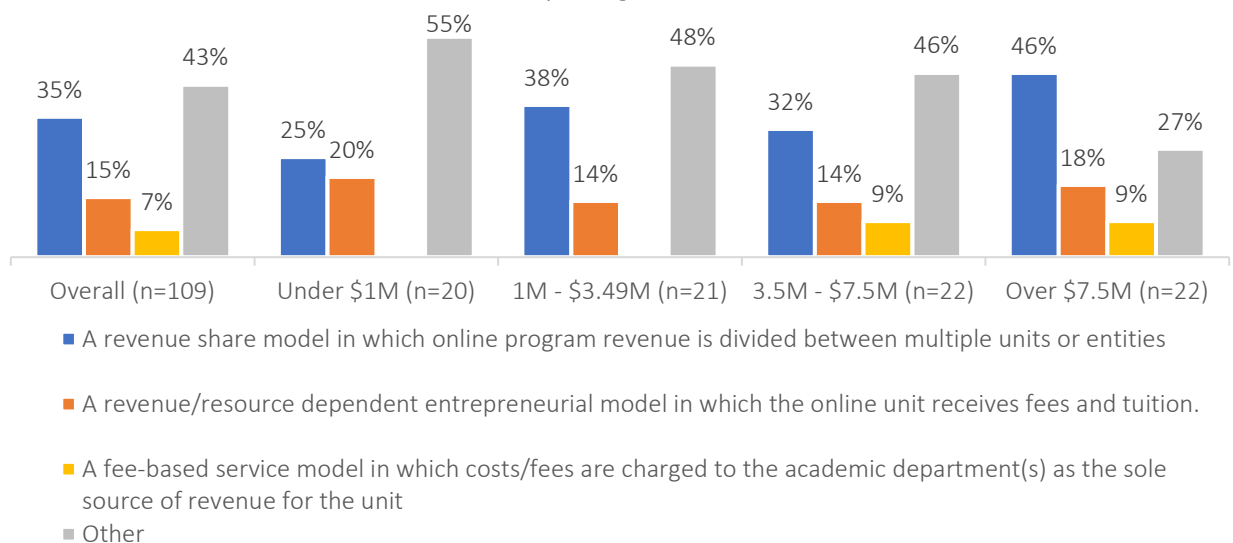
Figure 96: For the 2022-2023 academic year, what was your online unit's total *gross* revenue? Please list gross revenue in USD. By Budget Size

	Overall (n=59)	Under $1M (n=9)	1M - $3.49M (n=15)	3.5M - $7.5M (n=13)	Over $7.5M (n=20)
Average	$18,048,994	$9,778,111	$3,883,499	$13,301,539	$37,210,758
Median	$6,700,000	$2,000,000	$3,000,000	$6,700,000	$23,607,582

Financial Models

Nearly half (46%) of units that have a budget of over $7.5M have a revenue share model in which online program revenue is divided between multiple units or entities, followed by 32% of those with a budget between 3.5M-$7.5M, 38% of those with a budget between 1M-$3.49M, and a quarter (25%) of those with a budget under $1M.

Figure 97: Which of the following best describes your online unit's financial model? By Budget Size

|	Overall (n=109)	Under $1M (n=20)	1M - $3.49M (n=21)	3.5M - $7.5M (n=22)	Over $7.5M (n=22)
A revenue share model in which online program revenue is divided between multiple units or entities	35%	25%	38%	32%	46%
A revenue/resource dependent entrepreneurial model in which the online unit receives fees and tuition.	15%	20%	14%	14%	18%
A fee-based service model in which costs/fees are charged to the academic department(s) as the sole source of revenue for the unit	7%			9%	9%
Other	43%	55%	48%	46%	27%

Staffing

Units that have a budget of over $7.5M have an average number of 116 full-time or FTE employees funded by their online unit, while units that have a budget under $1M have an average of 8 full-time or FTE employees funded by the unit.

Figure 98: Including yourself, how many full-time or full-time equivalent (FTE) employees (i.e., two half-time employees equal one full-time employee) are funded by your online unit? By Budget Size
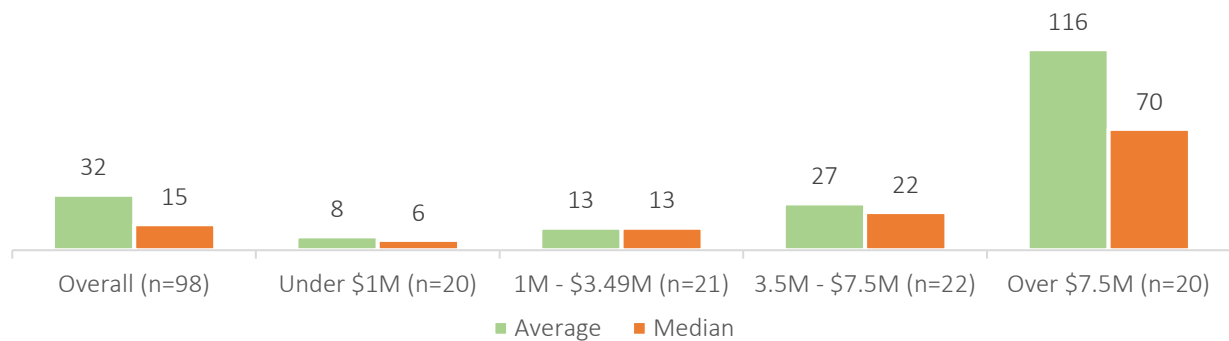
Units that have a budget between 3.5M-$7.5M have the highest average number of full-time or FTE employees that are funded outside the unit (16), followed by budgets of over $7.5M (8), and budgets between 1M-$3.49M (7).

Figure 99: How many full-time or full-time equivalent (FTE) employees that are involved in online learning but are funded outside of the online unit's budget? By Budget Size
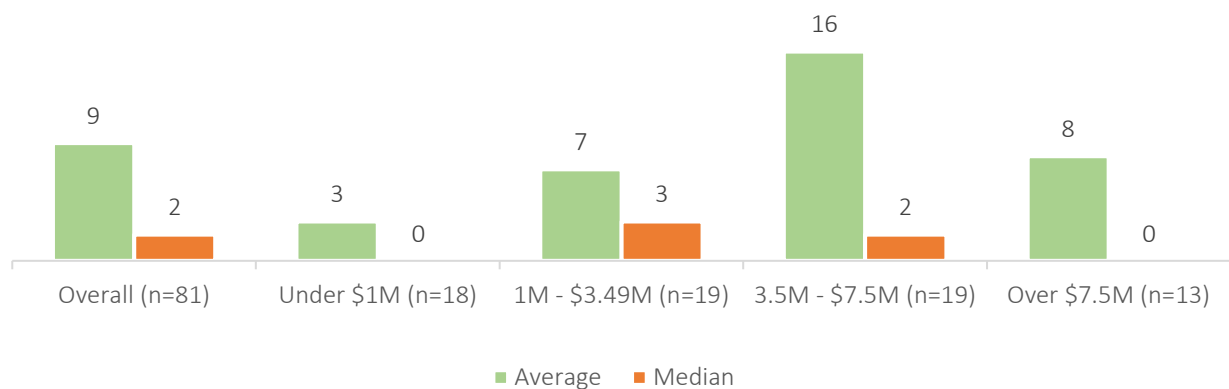
Instructional Design

Units with all budget sizes were most likely to say their online unit supports the institution's centralized design team.

Figure 100: What is the instructional design model that your online unit employs for the development of online programs? Please select all that apply. By Budget Size

- ■ Our online unit supports the institution's centralized instructional design team
- ■ Our online unit leverages a centralized instructional design team located elsewhere on campus
- ■ Our online unit leverages instructional design teams from other academic units
- ■ Other
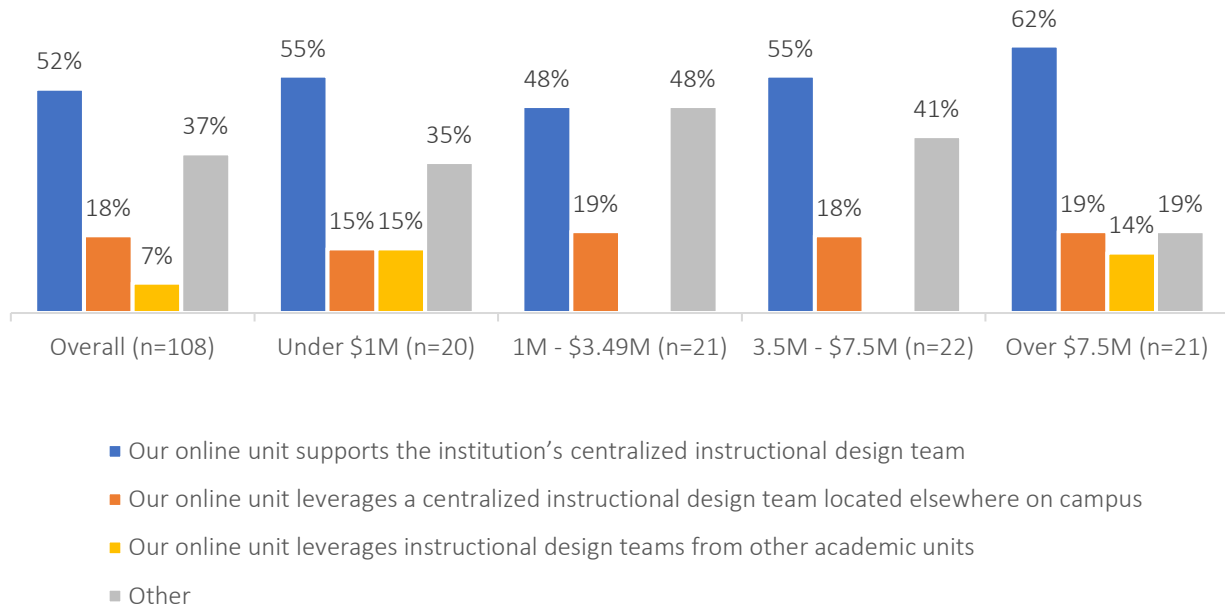
Among all unit budget sizes, full-time faculty and adjunct faculty are the most common types of online program instructors.

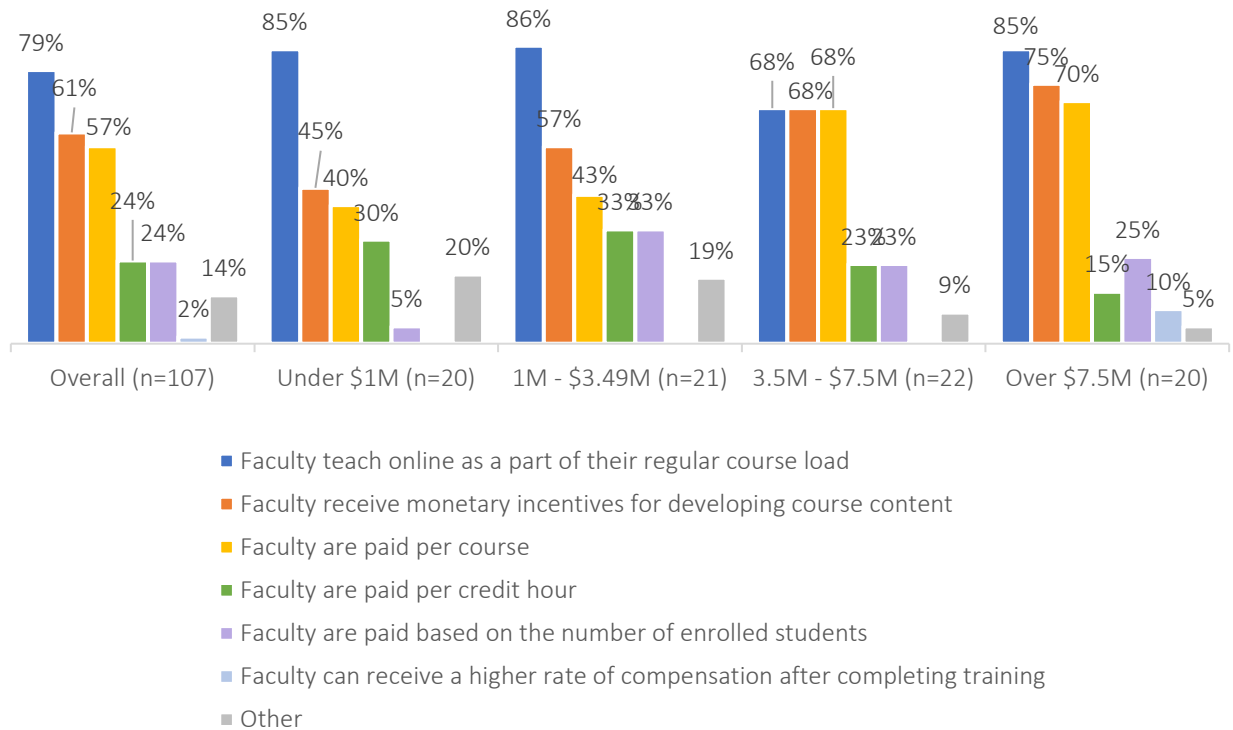**Figure 101: Who teaches in your online programs? Please select all that apply. By Budget Size**
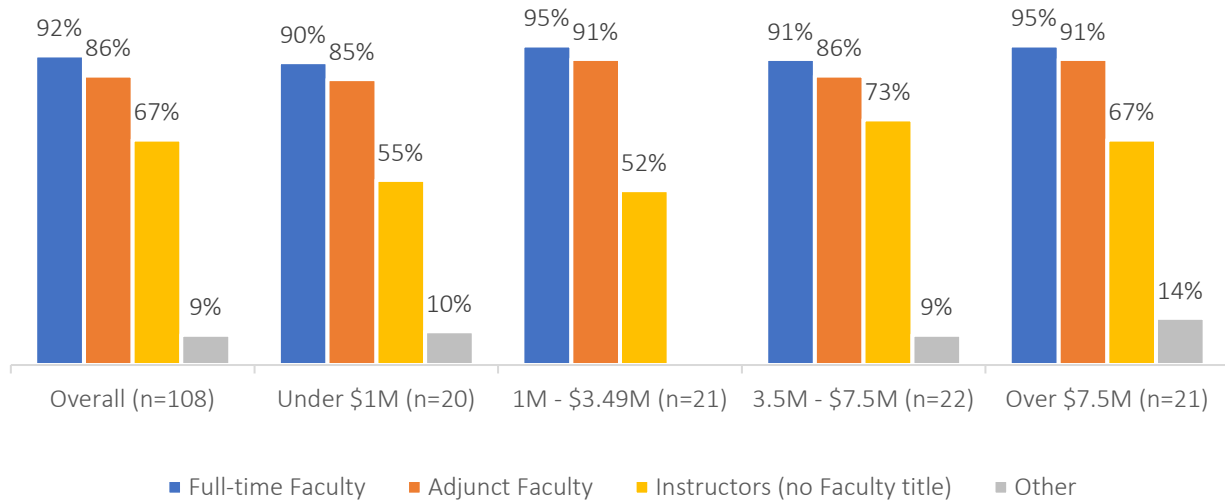
Legend: ■ Full-time Faculty ■ Adjunct Faculty ■ Instructors (no Faculty title) ■ Other

Units that have a budget size between 1M-$3.49M were most likely to say their online instructors are required to attend training or achieve proficiencies prior to teaching online (57%), followed by unit budget sizes under $1M (55%), unit budget sizes between 3.5M - $7.5M (50%), and budget sizes over $7.5M (43%).

Figure 102: Are your online instructors required to attend training or achieve proficiencies prior to teaching online? By Budget Size


Legend: ■ Yes ■ No ■ Not sure
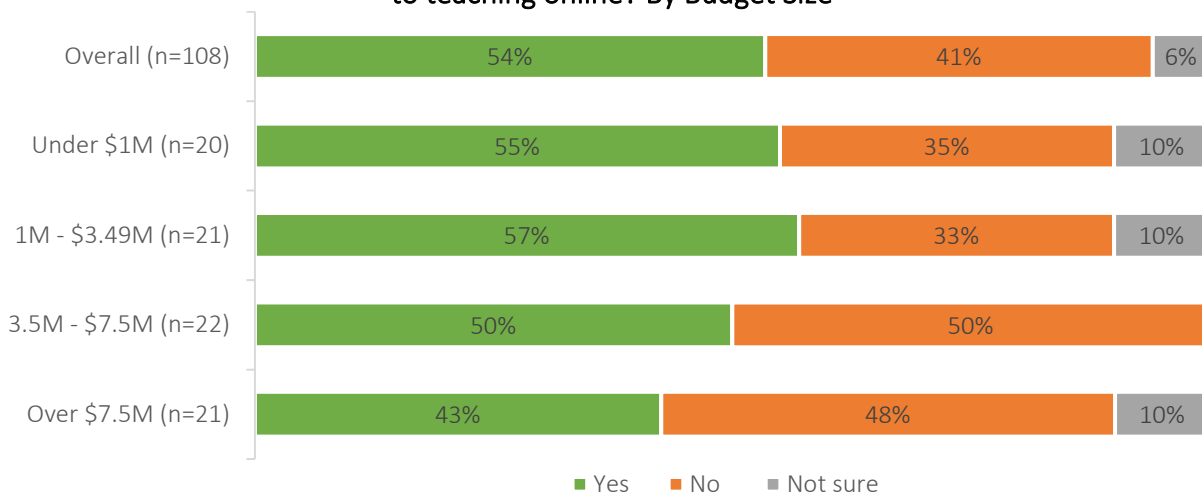
Units that have a budget under $1M, between 1M – $3.49M, and over $7.5M are all most likely to say that faculty are compensated by teaching online as a part of their regular course load.

Figure 103: How are the faculty teaching in your online programs compensated? Please select all that apply. By Budget Size


Legend:
- Faculty teach online as a part of their regular course load
- Faculty receive monetary incentives for developing course content
- Faculty are paid per course
- Faculty are paid per credit hour
- Faculty are paid based on the number of enrolled students
- Faculty can receive a higher rate of compensation after completing training
- Other

Among all unit budget sizes, online courses are most commonly discretionary, and can be either depending on faculty preference, department or college needs.

Figure 104: Are online courses considered part of load / faculty contractual workload or overload? By Budget Size

Legend:
- Is discretionary, can be either depending on faculty preference, department or college needs
- Part of load
- Overload
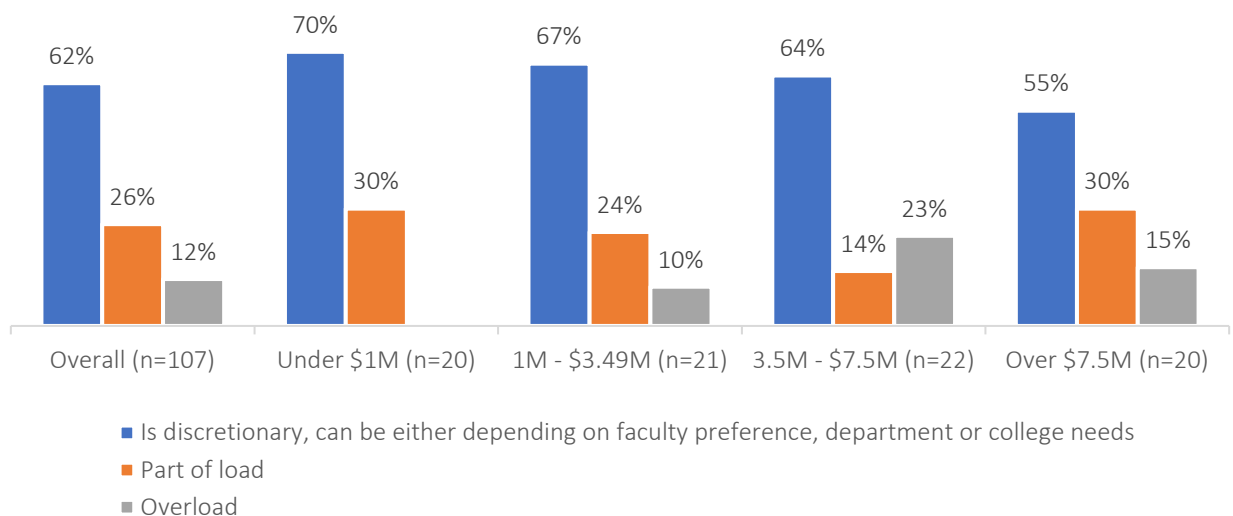
Among all unit budget sizes, salaries for instruction are most often paid by the academic department.

Figure 105: How are the salaries for instruction funded? Please select all that apply. By Budget Size

Legend: Paid by the Academic Department ■ Paid by the online unit ■ Paid by the Provost's Office ■ Other
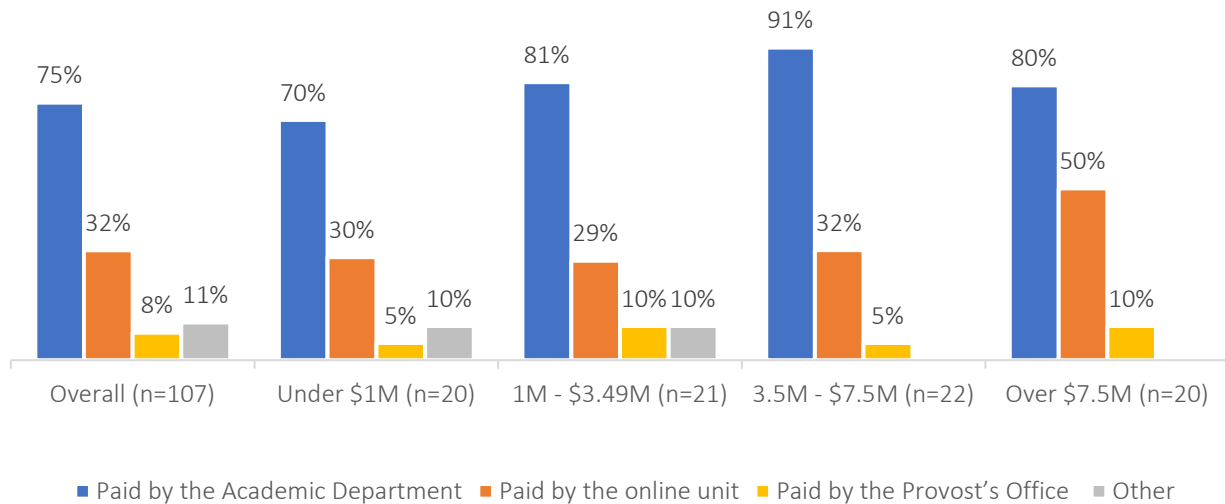
Contracted Services

When asked if their unit contracts for services, 38% of units with a budget between 1M - $3.49M said yes, followed by 32% of those with a budget between 3.5M - $7.5M, 30% of those with a budget under $1M, and only 20% of units with a budget over $7.5M.

Figure 106: Does your online education unit contract for services, often provided by an online program manager (OPM) organization? By Budget Size


Legend: ■ Yes ■ No ■ Not sure
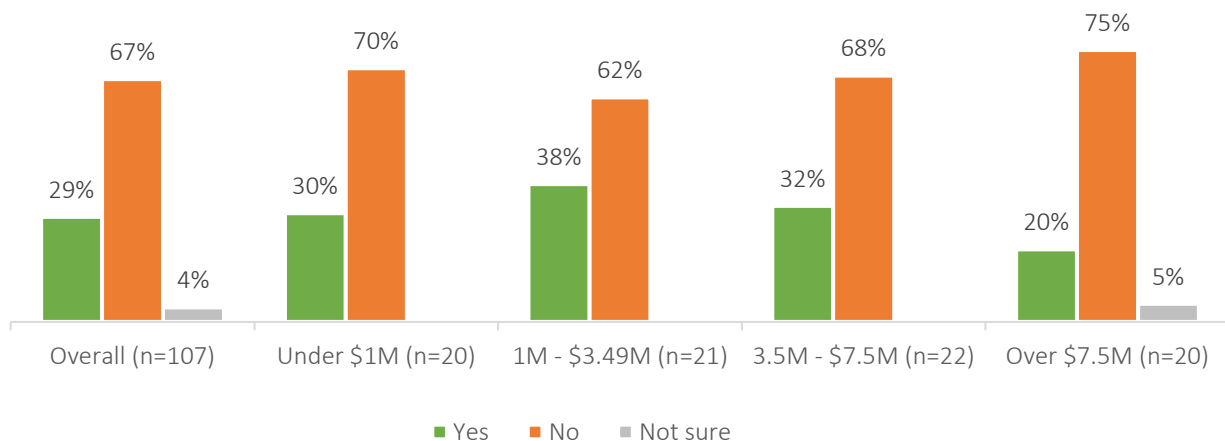
The most common purpose of using outside vendors is for marketing among most unit budget sizes.

Figure 107: Which of the following is your online education unit using outside vendors for? Please select all that apply. By Budget Size
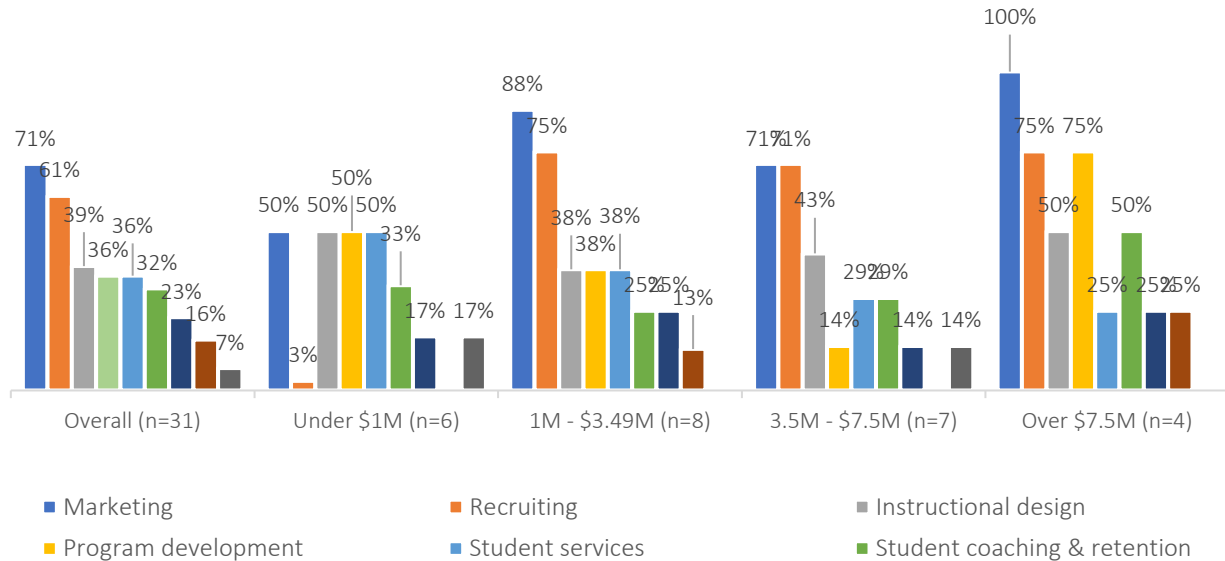
Units with a budget under $1M are most likely to say their online unit compensates outside vendors through tuition share (83%), as well as those with a budget between 1M - $3.49M (75%), while those with a budget over $7.5M are most likely to say online units compensate outside vendors with a fee for service (75%), as well as those with a budget between 3.5M - $7.5M (71%).

Figure 108: Which of the following best describes how your online unit compensates outside vendors? Please select all that apply. By Budget Size
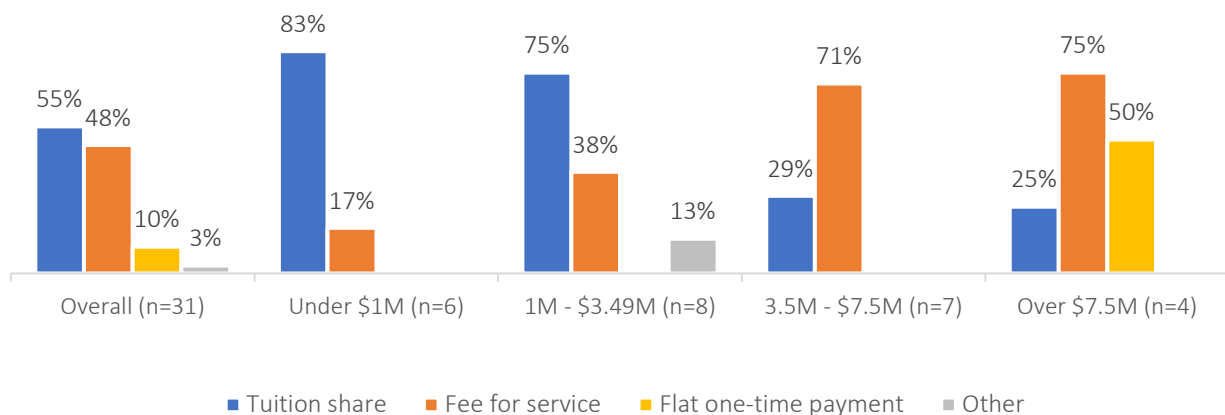
Growth in Online Demand

Online units with a budget over $7.5M are most likely to strongly agree or agree that their institution expects to obtain greater market share of the online marketplace in the next three years (95%), while those with a budget under $1M are most likely to strongly agree or agree that an increasing percentage of traditional undergraduate students desire online courses for at least some of their degree (95%).

Figure 109: Please rate how strongly you agree or disagree with the following statements (% Strongly Agree or Agree) By Budget Size
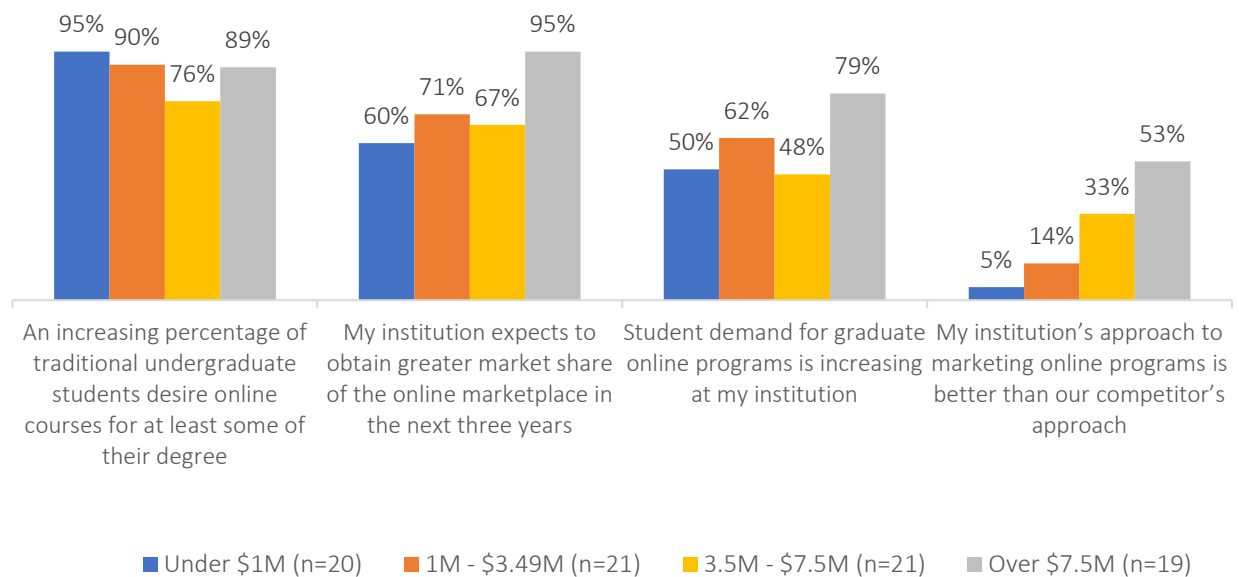
Future Survey Improvements and Topics

Survey Improvements

With this being the first online benchmarking survey conducted by UPCEA with these survey items and parameters for benchmarking, the researchers observed some possible opportunities for improvement.

Larger Population

The researchers had a population of over 500 online leaders that were members of UPCEA from which to solicit respondents. The next iteration of the survey will not rely solely on UPCEA's membership. To receive an invitation to participate in the next Online Enterprise Benchmarking Survey, please submit your contact information [here](#).

Soliciting Feedback from the Online Community

Noting the expertise of the researchers, with nearly sixty years of combined experience in postsecondary education, survey improvements specific to current trends and contexts require input from a wide swath of online leaders. As such, along with soliciting input from focus groups and advisory bodies, the researchers invite suggestions for improvements and lines of inquiry through a survey suggestion form, found [here](#).

Learners Served

The researchers did not ask the number of learners served by the online enterprise in this study. That number is notoriously difficult for some Chief Online Learning Officers (COLOs) to report, since many would include learners enrolled in hybrid and other web-enabled courses in such a number. Future surveys will include questions about the number of learners served, providing a clearer understanding of online program reach. To make things easier and to not force COLOs to seek out additional data, we will mirror what the Integrated Postsecondary Education Data System[4] defines as distance education learners[5] and the data required of institutions[6], allowing COLOs to supply current year or most recently reported numbers.

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[4] https://nces.ed.gov/ipeds/use-the-data/distance-education-in-ipeds
[5] "Distance education (DE) is education that uses one or more types of technology to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor synchronously or asynchronously."
[6] Enrolled exclusively in DE courses over a 12-month period; and enrolled in at least one, but not all, DE courses over a 12-month period

Future Topics

Instructional Design

As instructional design teams are as nuanced and contextual as an institution's strategy for online learning, these teams sit at the very heart of online learning, supporting subject matter experts in the development of quality online learning experiences.

Questions regarding how these teams are resourced, their size (number of FTEs, graduate assistants, and student employees), and the services provided by the team are top of mind for many postsecondary leaders. Future iterations of this study will include instructional design items, some of which may have appeared in research previously supported by UPCEA:

- Instructional Design and Technology Teams: Work Experiences and Professional Development (Fong et al., 2017)
- The Competencies and Goals of Instructional Designers: A Survey Study (Arnold et al., 2018; Magruder et al., 2019)
- How Much Work Did the Workers Work When the Workers Weren't at Work? (Arnold et al., 2020)
- The Workers are Alright – Year 3 of a Survey Study on Remote Work Perceptions for Higher Education Instructional Design Teams (Arnold et al., 2022)

Learner Analytics

Many online leaders are considering how to integrate learner analytics at their institution, specifically those made available in learning management systems (LMS) and other technologies deployed in online learning. Such analytics provide real-time data collection and analysis, offering educators instant feedback on student participation, progress, and outcomes.

Recent trends in learner analytics within higher education highlight a growing emphasis on predictive analytics and personalized learning experiences. Institutions are increasingly utilizing advanced data analysis techniques, including machine learning and artificial intelligence, to forecast student performance and retention rates. With these predictive capabilities, educators can intervene proactively and address potential challenges before they escalate. Advances in these technologies allow for the creation of learner-specific support, fostering a more customized educational experience that enhances student engagement and success.

As institutions adopt more sophisticated analytics tools, there is also a growing focus on ethical considerations surrounding data privacy and security. Educators and administrators are increasingly aware of the need to balance the benefits of analytics with the responsibility of safeguarding student information. This awareness is shaping policies and practices, ensuring that learner analytics not only drive improvement but also respect students' rights and foster a culture of trust within educational settings.

Learning analytics have been the focus of conferences, funders, and postsecondary leaders for over a decade (Bill & Melinda Gates Foundation, 2010). With the dawn of artificial intelligence and skills-based learning, assessments, and hiring, a deeper understanding of the instructional design that leads to the master of knowledge and skills is more possible than ever before. Thus, exploring this topic is necessary in a future survey iteration.

In UPCEA's study, 'Leveraging AI to improve learner outcomes and learner records', nearly a third (31%) of respondents reported that their institution is already using AI-powered tools to enhance the learner experience and outcomes.

Key findings include:
- 52% of institutions use predictive analytics to support student success.
- 52% use AI-driven feedback systems for assignments.
- 39% use adaptive learning platforms to personalize learning experiences.
- 39% use AI to simulate classroom experiences for more dynamic instruction.

Moreover, 71% of participants believe AI-driven tools will become extremely or very significant in the next two years, especially for improving learner outcomes. This shows growing recognition of AI's potential, but many institutions are still unsure about how to integrate these tools effectively.

Future iterations of this study will include learner analytics, likely paired with a discussion of artificial intelligence, further explored below.

Artificial Intelligence's Impact on Higher Education

The AI landscape in higher education is expanding rapidly, with more institutions embracing AI-powered tools to enhance educational processes and student learning. As AI continues to evolve, it is essential for institutions to adapt to these technological advancements to stay competitive and avoid being left behind. To achieve this, institutions must develop a deep understanding of AI's applications, benefits, and associated concerns, ensuring they implement these tools responsibly and ethically.

Recent research indicates (Etter et al., 2024), a majority of participants (71%) believe AI-driven tools will be extremely or very significant within the next two years in terms of their potential to help improve learner outcomes in higher education. This indicates that institutional staff recognize the potential benefits these technologies offer and their importance for student success, though they may be uncertain about how to begin integrating them effectively.

Despite the potential benefits of AI in higher education, this UPCEA survey revealed significant concerns, with 71% of respondents reporting challenges related to academic integrity or quality when using AI-driven tools. Additionally, concerns about data privacy, insufficient faculty and staff training, and doubts about the effectiveness of these tools are prevalent. This reluctance to adopt AI tools is driven not only by budgetary constraints but also by skepticism about their

reliability and overall impact. These concerns likely contribute to the fact that nearly half of the respondents reported that their institutions do not currently use AI tools to enhance learner outcomes or management learner records.

Addressing the challenges and confusion surrounding AI in higher education requires institutions to foster open discussions among leaders, faculty, and students. It is important to invest in proper training for faculty on AI-powered tools, enabling them to use these tools effectively and guide students in using them ethically, thus preventing issues like fraud and plagiarism. By providing comprehensive education on AI, institutions can smoothly integrate these technologies, streamline processes, and allow staff to focus more on student engagement while AI manages routine tasks like curriculum development and the creation of key educational resources such as learner outcomes and comprehensive learner records.

While the UPCEA Strategic Online Benchmarking Survey (2024) did not directly address AI, it does provide context on areas where AI integration could be beneficial. The survey shows that most online education units are housed in the Provost's office (41%), while others are distributed across multiple academic units (25%) or operate as standalone units (17%). This variation in structure suggests that AI adoption may differ depending on how decisions about technology are made within each unit.

Future iterations of this study will include a thorough examination of AI in the online enterprise.

Conclusion

The 2024 UPCEA Strategic Online Benchmarking Survey offers a comprehensive look at the organization, resources, and strategies of online education units across various institutions. These findings provide a valuable point of reference for institutional leaders as they seek to enhance their online education efforts.

Based on the survey results, the following key recommendations can help guide strategic planning and decision-making:

1. **Strengthen Strategic Positioning:** Use the survey's benchmarks to identify both strengths and areas for growth. Assessing budget allocation, staffing models, and structural alignment against peer institutions can help support long-term online education growth.

2. **Advance Inclusivity:** While many institutions are actively working on strategies to increase inclusivity and accessibility, there is room for improvement. Institutions should evaluate their current efforts and consider adopting best practices that better support diverse student populations.

3. **Commit to Continuous Benchmarking:** Institutions are encouraged to regularly review these findings and participate in future surveys to track progress, adjust strategies, and stay current with sector trends.

4. **Leverage AI Thoughtfully:** AI technologies are recognized as essential tools for scaling programs, improving student success, and boosting marketing initiatives. Institutions should explore strategic investments in AI that align with their capacity while ensuring ethical use and effective implementation.

These recommendations support UPCEA's mission to empower higher education institutions as they innovate and expand online and professional education, driving improved access and outcomes for learners. The survey's insights underscore the need for data-informed decision-making and strategic planning in today's rapidly changing educational environment.

Composing a comprehensive discussion that summarizes a lengthy report with an examination of variables across several parameters is notoriously difficult, and this report is not an exception. Yet two key items, not discussed in the report, may demonstrate the importance of online learning in postsecondary education and the need to benchmark institutional efforts in this domain.

First, reviewing the trend in distance education enrollments at Title-IV granting institutions in the United States we see that online enrollments have declined from their COVID-19 pandemic highs, but are still well above where they were pre-pandemic. This suggests both a sustained interest in online learning by those engaged in teaching and learning as well as more institutional support.

Figure 110: Percent of Students Enrolled in Distance Education Courses
in Title IV Institutions in the United States[7]

Year	Percent of Students Enrolled in Distance Education Courses
2022	53.30%
2021	58.90%
2020	73.40%
2019	36.30%
2018	34.70%
2017	32.90%
2016	31.20%
2015	29.30%
2014	27.70%
2013	26.40%
2012	25.50%

Second, one only needs to observe the regular announcements made by campus leaders, focused on the need to shift to asynchronous or 'remote' learning for a host of reasons (inclement weather[8], facility issues[9], financial woes[10], campus protests[11], campus threats[12], and transportation issues[13]). While remote instruction is not in and of itself a testament to the quality of, and need for, appropriate resourced online enterprises, it is important to note that the very same infrastructure used to ensure academic continuity is one shared by online learning and supported by IT divisions and online enterprises. Moreover, online leaders are the very same individuals called upon to support sudden changes in instructional modality, suggesting an adaptability and mobilization of resources (both human and technological) unseen prior to the pandemic. Further, the fact that these changes are made with confidence by institutional leaders suggests that the lessons learned during the pandemic, when paired with the expertise of the online enterprise(s), have been memorialized in current and future contingency plans of colleges and universities throughout the country, irrespective of the actual conditions that precipitated the need for a shift in instruction.

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[7] Integrated Postsecondary Education Data System (IPEDS), 2024

[8] https://uca.edu/news/inclement-weather-announcement-all-instruction-remote-on-thursday-feb-3-2022/

[9] https://ncatregister.com/22021/the-yard/n-c-at-students-forced-to-relocate-after-a-shortage-of-heat-and-hot-water-in-dorms/

[10] https://www.wral.com/story/financial-crisis-saint-augustine-s-switching-to-remote-learning-in-april-savesau-calls-for-resignation-of-board-of-trustees/21336316/

[11] https://abc7ny.com/columbia-university-protests-result-in-remote-learning-on-monday-first-night-of-passover/14712972/

[12] https://www.insidehighered.com/news/students/safety/2024/09/17/colleges-springfield-rocked-trumps-lie

[13] https://www.nbcnews.com/news/us-news/barge-slams-galveston-bridge-texas-causing-partial-collapse-shutdown-rcna152425

Without a doubt, an appropriately resourced online enterprise is a necessity for all institutions. The researchers have endeavored to provide institutional leaders with the opportunity to compare their online efforts to those of their peers of similar institution size, institution type, online organization within the larger institution, and by the annual budget of the online enterprise. It is in these comparisons, as well as in aspirational benchmarking, perhaps most relevant to those seeking a better organizational structure or additional budget allocations, that online leaders can plan strategically and advance online learning, as a whole, in postsecondary education.

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Appendix: Online Enterprise Benchmarking Survey Questions

Strategic Online Benchmarking Survey

[Respondents will not see items in brackets]

Thank you for agreeing to help us with this important research. The results of this survey will be featured as a session at UPCEA's #dtlsolar24 event in July. The survey will take approximately 10 minutes to complete. All responses will remain anonymous. Those that would like to receive a copy of the final research paper produced as a result of this research will have an opportunity to enter their name and email at the conclusion of the survey.

Demographics

1) Which of the following best describes your institution?
   a) Private research institution
   b) Public research institution
   c) Master's comprehensive institution
   d) Baccalaureate/special focus institution
   e) For-profit institution
   f) Two-year institution
   g) Other (please specify)

2) Which of the following best describes your overall institution size for the 2022-2023 academic year?
   a) Small (fewer than 5,000 undergraduate and graduate students)
   b) Medium (5,000 to 15,000 undergraduate and graduate students)
   c) Large (more than 15,000 undergraduate and graduate students)

3) What is your title?

4) Which of the following best describes where your institution's online education unit resides?
   a) Provost's office
   b) Standalone unit
   c) Nested within multiple academic units (i.e., colleges, schools, etc.)
   d) Other (please specify)

[Only show for those that indicate multiple units in Q4] If there are other people at your institution with a similar title or level at another online enterprise within your institution, please invite them to participate in this research using this link: XXXX

5) Do you *currently* work in a unit tasked with managing or delivering online programs?
   a) Yes
   b) No [Terminate]
   c) Not sure [Terminate]

6) Please rate how strongly you agree or disagree with the following statements:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
My online unit is *administratively* decentralized. For the purpose of this research, administratively decentralized is defined as most administrative functions (e.g., enrollment management, student support, instructional design, etc.) occurring in individual academic units or in other university units, even those that are centralized, outside the online enterprise (e.g. University marketing)					
My online unit is *academically* decentralized. For the purpose of this research, academically decentralized is defined as faculty, programs, and courses emanating from multiple academic departments or units for online programs.					

Online Enterprise - Size and Structure

7) Are you responsible for online leadership and strategy at any of the following levels?
   a) Institutional level
   b) Unit level
   c) Not responsible for online leadership and strategy at any level [Terminate]
   d) Not sure [Terminate]

8) Who does the Chief Online Learning Officer (COLO) primarily report to? If the COLO has multiple reporting lines, inclusive of dotted lines, please choose "other" and describe the reporting relationships.
   a) Provost
   b) Institution President
   c) Dean of an academic unit
   d) Other (please specify)

9) Which of the following are responsibilities for your online education unit? Please select all that apply.
   a) Helpdesk/technical support for the LMS
   b) Helpdesk/technical support for other areas of the institution
   c) Supporting software and apps used in online learning
   d) Supporting software and apps for other areas of the institution
   e) Teaching and learning center
   f) Other (please specify)

10) Which of the following program types are included in your online unit's portfolio of programs that it supports? Please select all that apply
   a) Undergraduate credit-bearing certificates
   b) Undergraduate degrees
   c) Graduate credit-bearing certificates
   d) Graduate degrees
   e) Microcredentials, non-degree or alternative credentials
   f) Other (please specify)

Online Enterprise - Budget and Finance

11) For the 2022-2023 academic year, what was your online unit's *total* budget? Please list the budget in USD.

12) Including yourself, how many full-time or full-time equivalent (FTE) employees (i.e., two half-time employees equals one full-time employee) are funded by your online unit?

13) How many full-time or full-time equivalent (FTE) employees that are involved in online learning but are funded outside of the online unit's budget?

14) For the 2022-2023 academic year, what was your online unit's total *gross* revenue? Please list gross revenue in USD.

15) Which of the following best describes your online unit's financial model?

a) A fee-based service model in which costs/fees are charged to the academic department(s) as the sole source of revenue for the unit
b) A revenue share model in which online program revenue is divided between multiple units or entities
c) A revenue/resource dependent entrepreneurial model in which the online unit receives fees and tuition.
d) Other (please specify)

Instruction & Faculty

16) What is the instructional design model that your online unit employs for the development of online programs? Please select all that apply.
   a) Our online unit supports the institution's centralized instructional design team
   b) Our online unit leverages instructional design teams from other academic units
   c) Our online unit leverages a centralized instructional design team located elsewhere on campus.
   d) Other (please specify)

17) Who teaches in your online programs? Please select all that apply.
   a) Full-time Faculty
   b) Adjunct Faculty
   c) Instructors (no Faculty title)
   d) Other (please specify)

18) Are your online instructors required to attend training or achieve proficiencies prior to teaching online?
   a) Yes
   b) No
   c) Not sure

19) How are the Faculty teaching in your online programs compensated? Please select all that apply.

a) Faculty teach online as a part of their regular course load

b) Faculty are paid per credit hour

c) Faculty are paid per course

d) Faculty are paid based on the number of enrolled students

e) Faculty receive monetary incentives for developing course content

f) Faculty can receive a higher rate of compensation after completing training

g) Other (please specify)

20) Are online courses considered part of load / faculty contractual workload or overload?
   a) Part of load
   b) Overload
   c) Is discretionary, can be either depending on faulty preference, department or college needs.

21) How are the salaries for instruction funded? Please select all that apply.
   a) Paid by the online unit
   b) Paid by the Academic Department
   c) Paid by the Provost's Office
   d) Other (please specify)

Contracted Services

22) Does your online education unit contract for services, often provided by an online program manager (OPM) organization?
   a) Yes
   b) No [Go to Q25]
   c) Not sure [Go to Q25]

23) Which of the following is your online education unit using outside vendors for? Please select all that apply.
    a) Program development
    b) Student services
    c) Marketing
    d) Recruiting
    e) Instructional design
    f) Help desk
    g) Student coaching & retention
    h) Program management
    i) Other (please specify)

24) Which of the following best describe how your online unit compensates outside vendors? Please select all that apply.
    a) Fee for service
    b) Tuition share
    c) Flat one-time payment
    d) Other (please specify)

Policy

25) Please rate how strongly you agree or disagree with the following statements regarding various US federal policy concerns:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Don't Know
Gainful employment data requirements for offering financial aid for certificates has caused my online unit to change its strategy or offerings						
Threats to state authorization reciprocity is a cause for concern						
Current federal policies and potential regulatory changes are affecting the planning process for online education	[Show Q26]	[Show Q26]	[Hide Q26]	[Hide Q26]	[Hide Q26]	[Hide Q26]
My institution regularly engages in advocacy or collaborative efforts to influence federal policy and regulation for online education	[Show Q26]	[Show Q26]	[Hide Q26]	[Hide Q26]	[Hide Q26]	[Hide Q26]

26) [Hide if row 3 & 4 in Q25 are both neither agree or strongly agree] Please provide any additional information about how your unit is impacted by, or advocates for, federal policies and regulatory changes in online education?

Competitive Environment

27) Which of the following does your online unit use to better position its online programs in a competitive environment? Please select all that apply.
   a) Affordable pricing vs. other institutions
   b) Lower pricing than in-person courses
   c) Scholarships
   d) Generous credit transfer policies
   e) Prior learning assessment / award of credit
   f) Coaching / Mentors
   g) Access to job placement / career services
   h) Brand strength
   i) Program quality
   j) National rankings
   k) Faculty expertise
   l) Marketing and enrollment strategies
   m) Stackable credentials
   n) Professional certifications nested within programs
   o) Other (please specify)

28) How strongly do you agree or disagree with the following statements:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
My institution expects to obtain greater market share of the online marketplace in the next three years					
My institution's approach to marketing online programs is better than our competitor's approach					
Student demand for *graduate* online programs is increasing at my institution					
An increasing percentage of *traditional undergraduate* students desire online courses for at least some of their degree					

29) Please rate how strongly you agree or disagree with the following statement: my online unit has established strategies and efforts to ensure online programs are inclusive and accessible to a diverse student population?
- a) Strongly agree
- b) Agree
- c) Neither agree nor disagree
- d) Disagree
- e) Strongly disagree

30) Which of the tactics does your online enterprise use with regard to student identities and individual needs? Please select all that apply.
- a) Learners can state their pronouns in their course profile
- b) Learners can edit/show their preferred name in the course roster/discussions
- c) Learners do not have to be on camera for meetings
- d) Course offers fully asynchronous learning option
- e) Assignments are always due on the same day/time for learners to plan ahead (i.e., Sundays at midnight, etc.)
- f) Provide transcripts and captions for all video content.
- g) Use primary sources/case studies from a diverse set of scholars/leaders/organizations
- h) Other (please specify)
- i) None of the above

31) If you'd like to receive a copy of the final results when they become available, please provide the following
- a) First name
- b) Email

About the Researchers

Julie Uranis, Ph.D.
Senior Vice President, Online and Strategic Initiatives
Julie Uranis serves as the Sr. Vice President for Online and Strategic Initiatives at UPCEA. In this capacity she is the Managing Director of the National Council for Online Education and leads UPCEA's online portfolio, inclusive of the planning efforts for the Summit for Online Leadership and Administration and several affinity groups within UPCEA. Prior to joining UPCEA she led the distance learning and continuing and professional development teams at Western Kentucky University where she served as the Chief Online Learning Officer (COLO) with the title of Director of Distance Learning and Innovation. She began her career at Eastern Michigan University (EMU) where she held both teaching and administrative positions. Uranis has a Ph.D. in Educational Leadership, a Master of Science in Technology Studies, and a Graduate Certificate in Community College Leadership from EMU. She earned a Bachelor of Arts degree in History from the University of Michigan-Dearborn. Uranis publishes and consults on online administration, professional and continuing education, working with adult learners, competency-based education, alternative/non-degree credentials and bachelor completion programs for career/technical students.

Kathleen Ives, D.M.
Chief Business Development Officer & Senior Vice President of Member Engagement, UPCEA

Kathleen Ives serves as UPCEA's Chief Business Development Officer & Senior Vice President of Member Engagement. With extensive experience in non-profit, higher education, workforce development, and corporate sectors, she currently oversees membership, partnerships, research, and consulting. In this role, she drives member engagement, forges strategic alliances, conducts research, and provides consulting services to support UPCEA's mission. Dr. Ives is also a Senior Advisor and Instructional Designer for Hillstock and Associates, an e-learning consulting firm, and Senior Affiliate Faculty at Wentworth Institute of Technology. She serves on the advisory board of the Center for Learning Innovations and Customized Knowledge Solutions (CLICKS), which supports higher education in the Arab region through leadership development, quality enhancement, and technology integration. She co-edited and authored chapters in the books *Using ROI for Strategic Planning of Online Education* and *Leading the eLearning Transformation of Higher Education.* Previously, as CEO of the Online Learning Consortium (OLC), Dr. Ives led its transition to a self-sustaining member association. She holds degrees in communication, communication management, and organizational leadership from UC Davis, USC Annenberg, and the University of Phoenix-Online, respectively.

Bruce Etter
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Bruce Etter is the Senior Director of Research and Consulting for UPCEA. Bruce has been working for UPCEA in a variety of capacities since 2014 and is responsible for developing and managing all UPCEA research initiatives. Bruce frequently presents research findings at UPCEA and partner events, and has authored nearly 20 research papers, most recently *Leveraging AI to Improve Learner Outcomes and Learner Records*. He graduated from Penn State University with a B.S. in Sociology and a minor in Sustainability Leadership.

Deja Sullberg
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Deja Sullberg is a Data Analyst on the Research and Consulting team at UPCEA. She earned her B.A. in Psychology from California State University, Fullerton in 2018, followed by an M.S. in Global Affairs with a concentration in Data Analysis from New York University in 2022. Over the past two years, Deja has been instrumental in UPCEA's analytical efforts, contributing to 10 publications.

About UPCEA

UPCEA is the online and professional education association. Our members continuously reinvent higher education, positively impacting millions of lives. We proudly lead and support them through cutting edge research, professional development, networking and mentorship, conferences and seminars, and stakeholder advocacy. Our collaborative, entrepreneurial community brings together decision makers and influencers in education, industry, research, and policy interested in improving educational access and outcomes. Learn more at https://upcea.edu

UPCEA is the professional home for chief online learning officers (COLOs). The Council for Chief Online Learning Officers (C-COLO) is an exclusive group within UPCEA, providing COLOs with professional development programs infused with peer-learning, networking, and collaboration. The C-COLO convenes annually in person at the Summit for Online Leadership and Administration and throughout the year virtually around specific topics of interest for COLOs. Visit UPCEA's website for more information on the online leadership and our events here: https://upcea.edu/leaders-in-online-education.

Led by its Research and Consulting team, UPCEA's research initiatives and interests are as diverse as its membership. With the unique qualities of each individual institution in mind, UPCEA conducted this research to empower higher education institutions with actionable insights, helping them innovate, expand access, and enhance the quality of online and professional education. By providing data-driven benchmarks, UPCEA aims to support institutions in making informed strategic decisions that positively impact learners worldwide. To learn more about UPCEA's research and consulting capabilities click here: https://upcea.edu/resources/research-benchmarking/

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