

COLLEGIS SUMMIT 2025

DISRUPTED

BREAKTHROUGH THINKING. BOLD RESULTS.

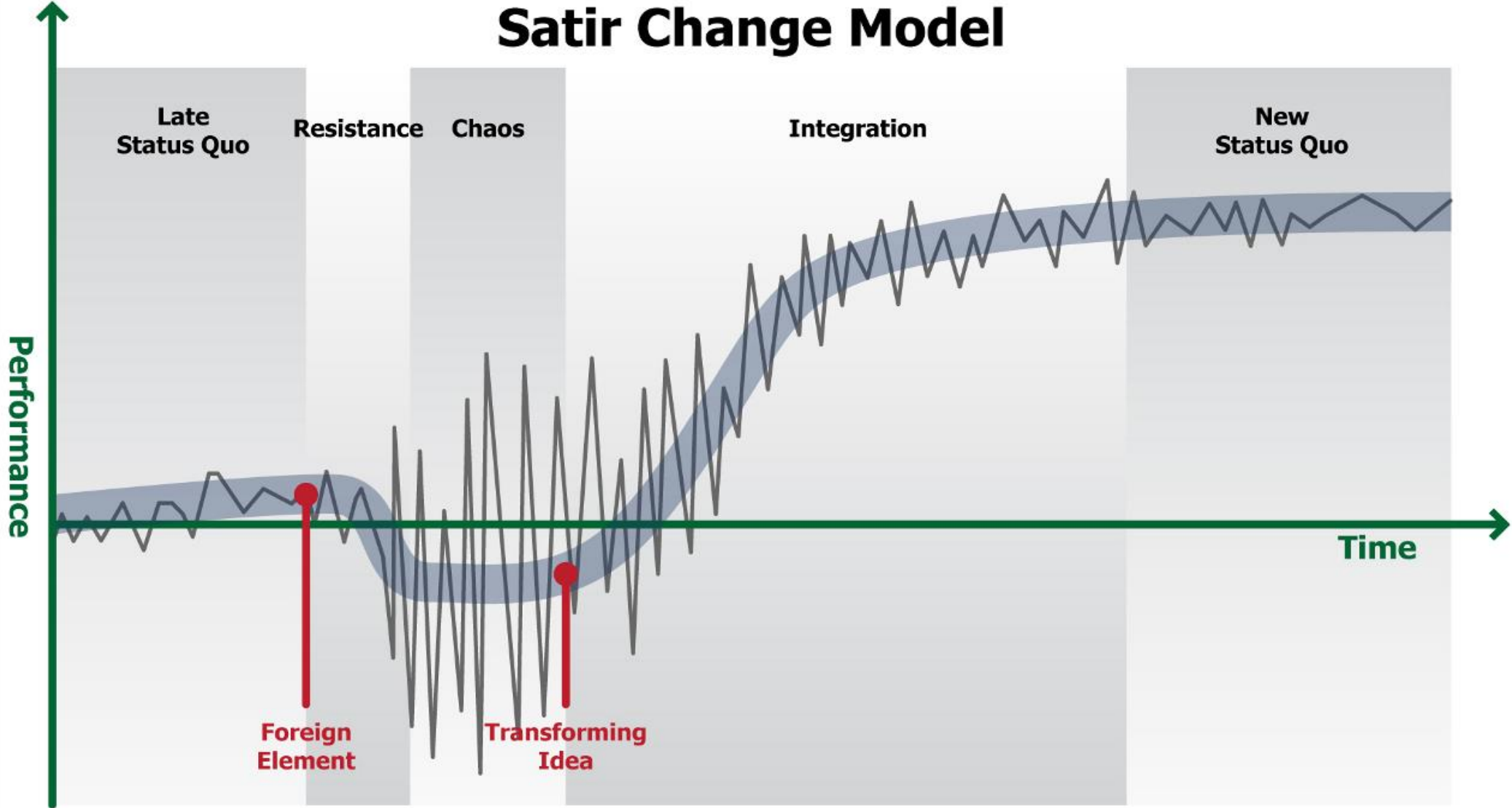


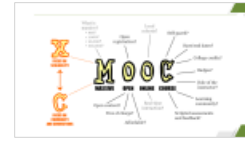
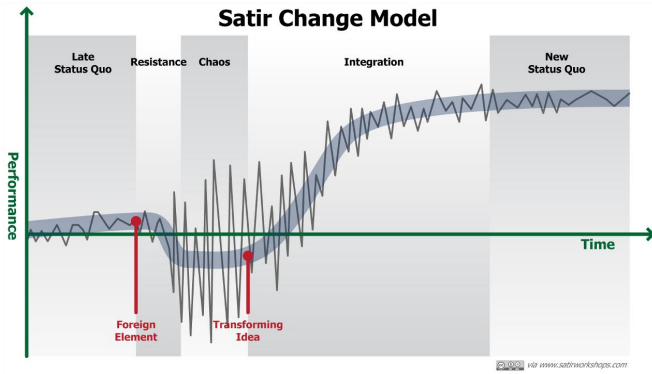
Build or Buy: But You Need to Own Your Online Strategy

September 25, 2025

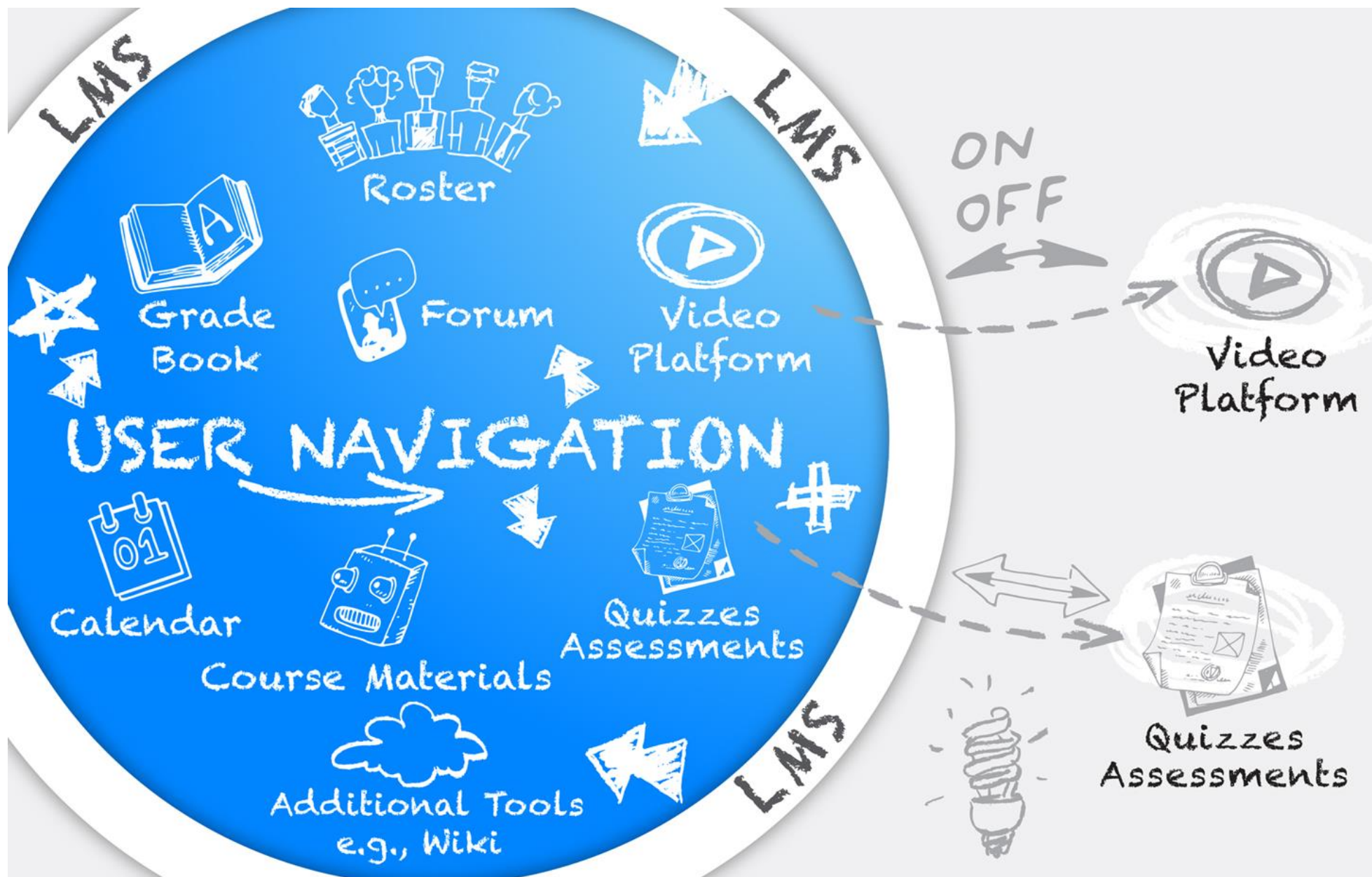
Phil Hill; *On EdTech* Newsletter: onedtech.philhillaa.com

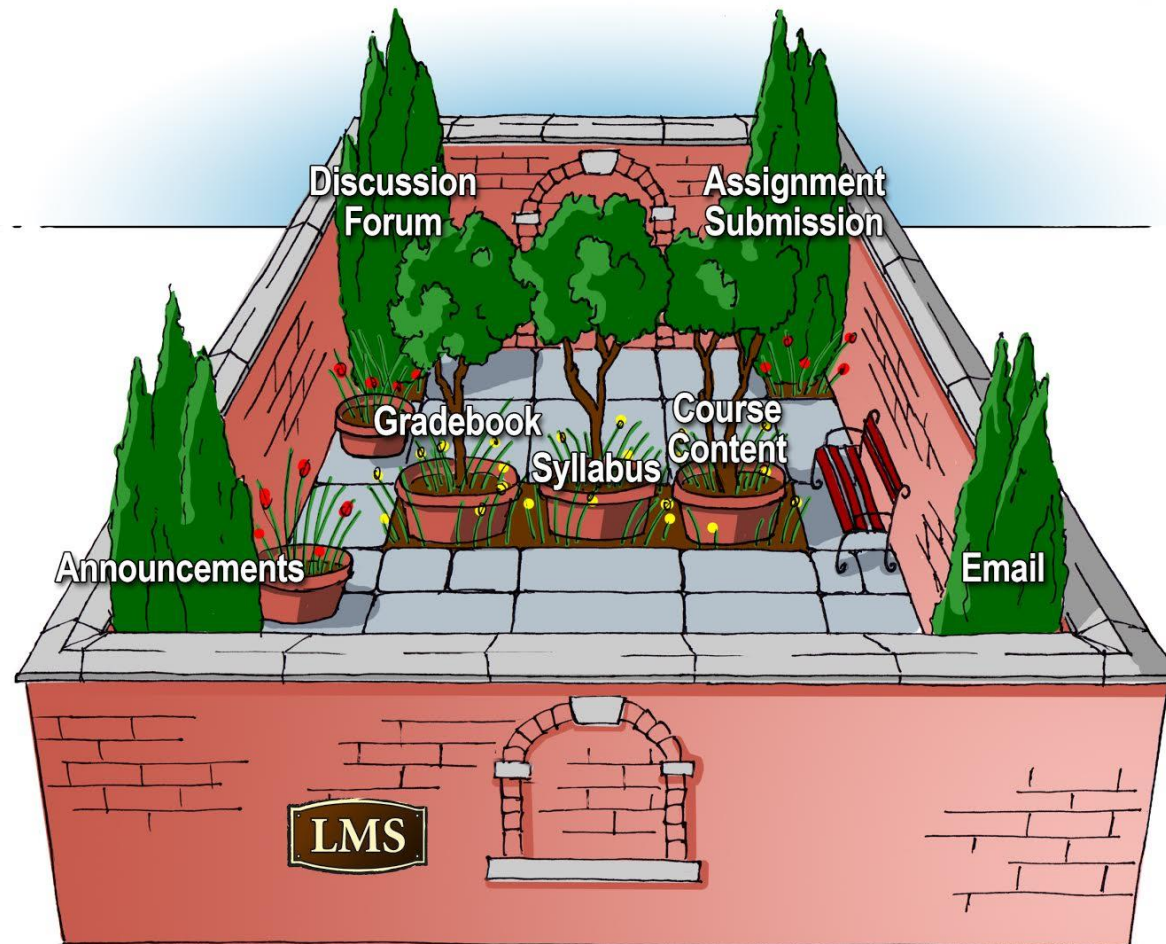
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Foreign Element	Transforming Idea
Dot Com e-Learning	Learning Management Systems (LMS) / Virtual Learning Environments (VLE)
Massive Open Online Courses (MOOC) and Early Online Program Managers (OPM)	All colleges and universities should have an online education strategy
Covid Remote Learning (Zoom U)	Mainstream experience with online & hybrid education
Generative AI Chatbots	...
Regulatory Chaos	Program Viability Focus





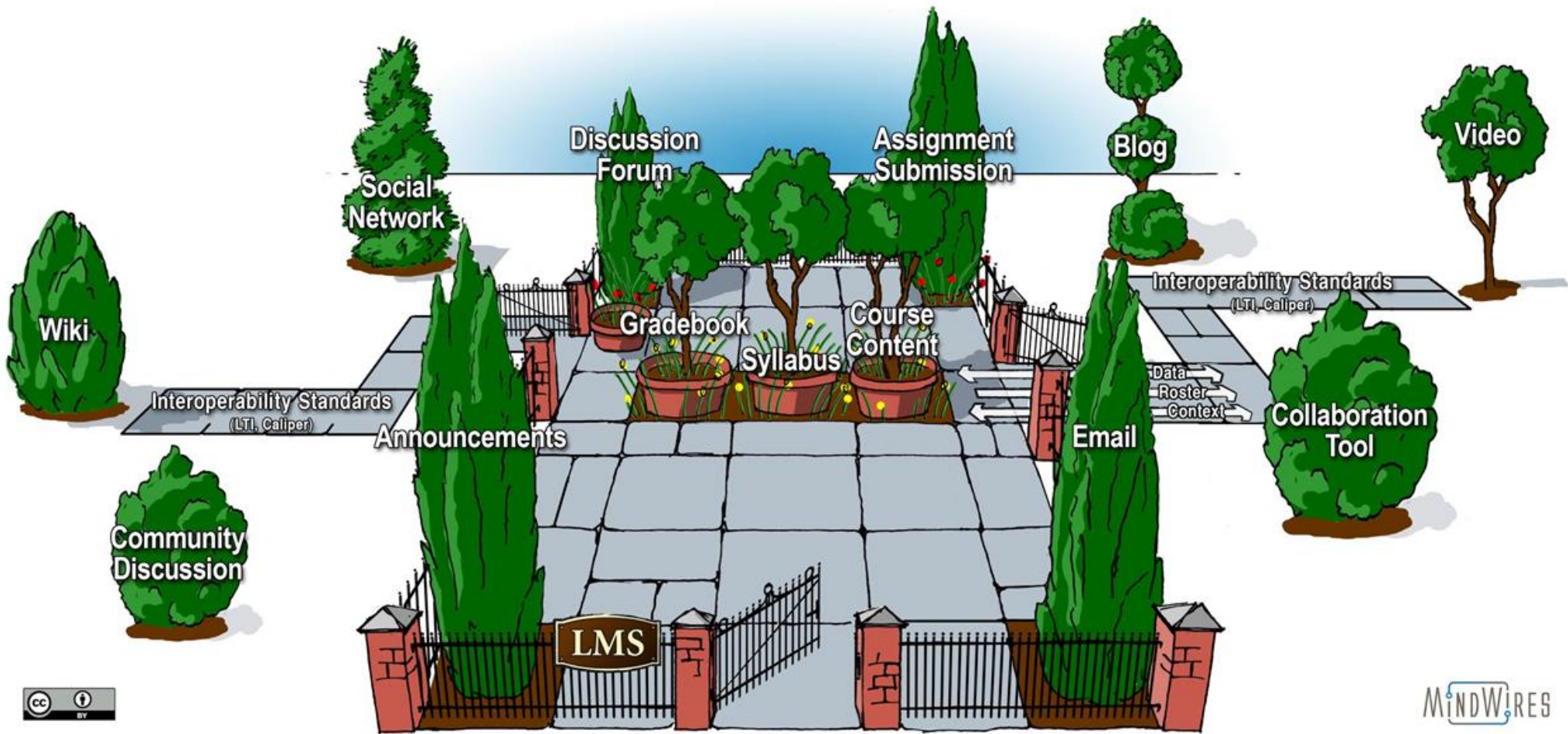




Figure 1. Lab Assignments: Students in DSL Lab Sections Outperformed Students in Non-DSL Lab Sections

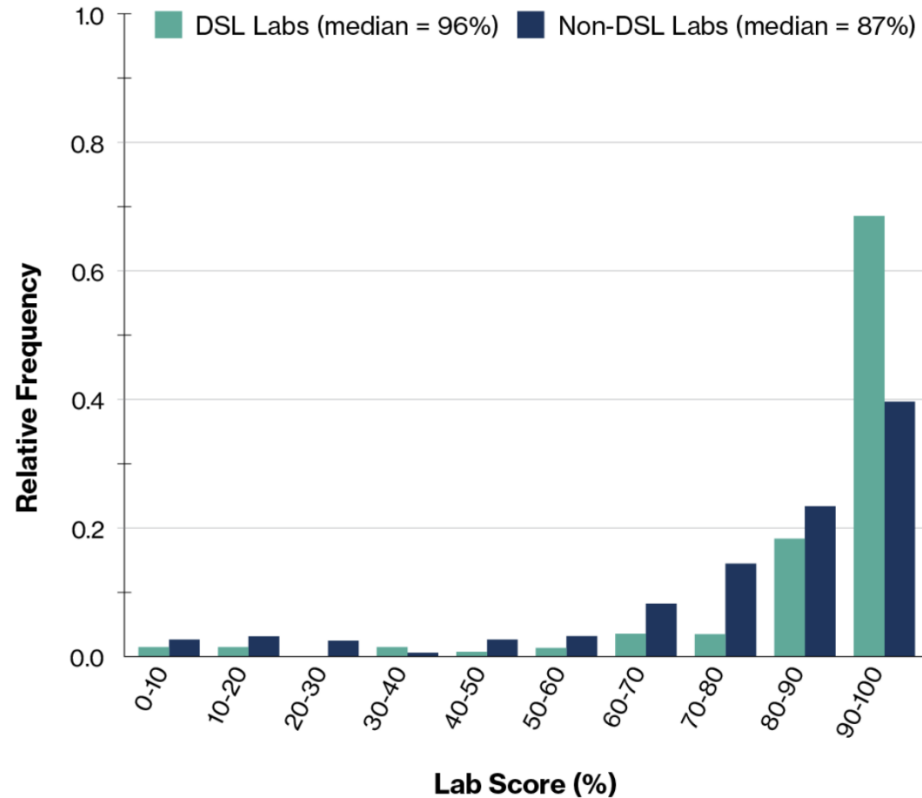
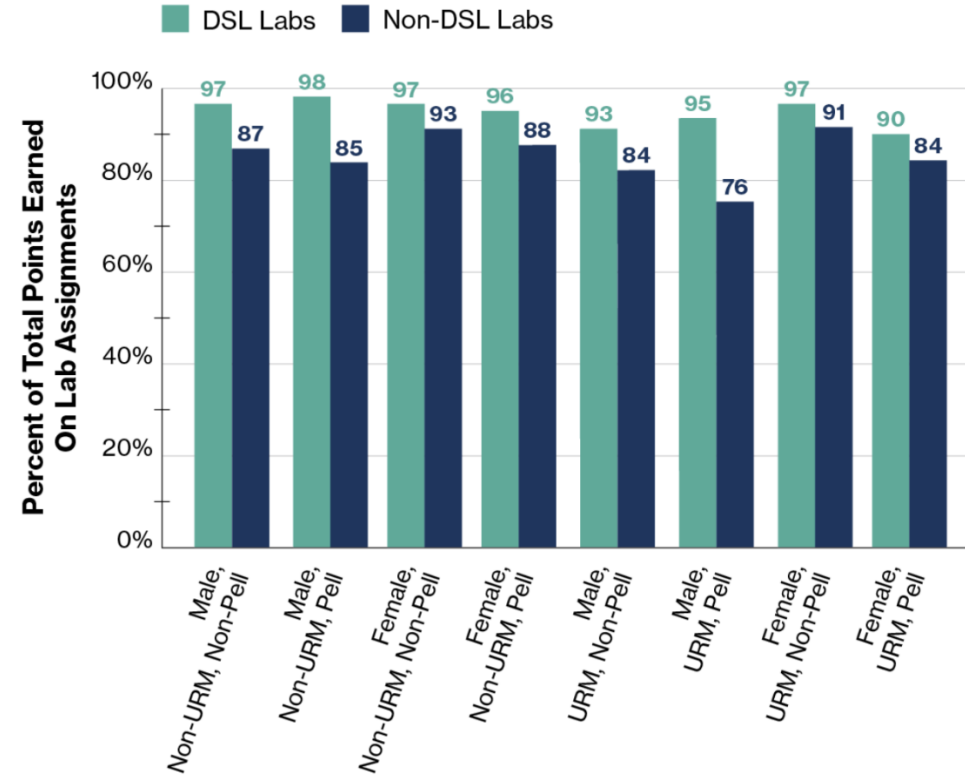
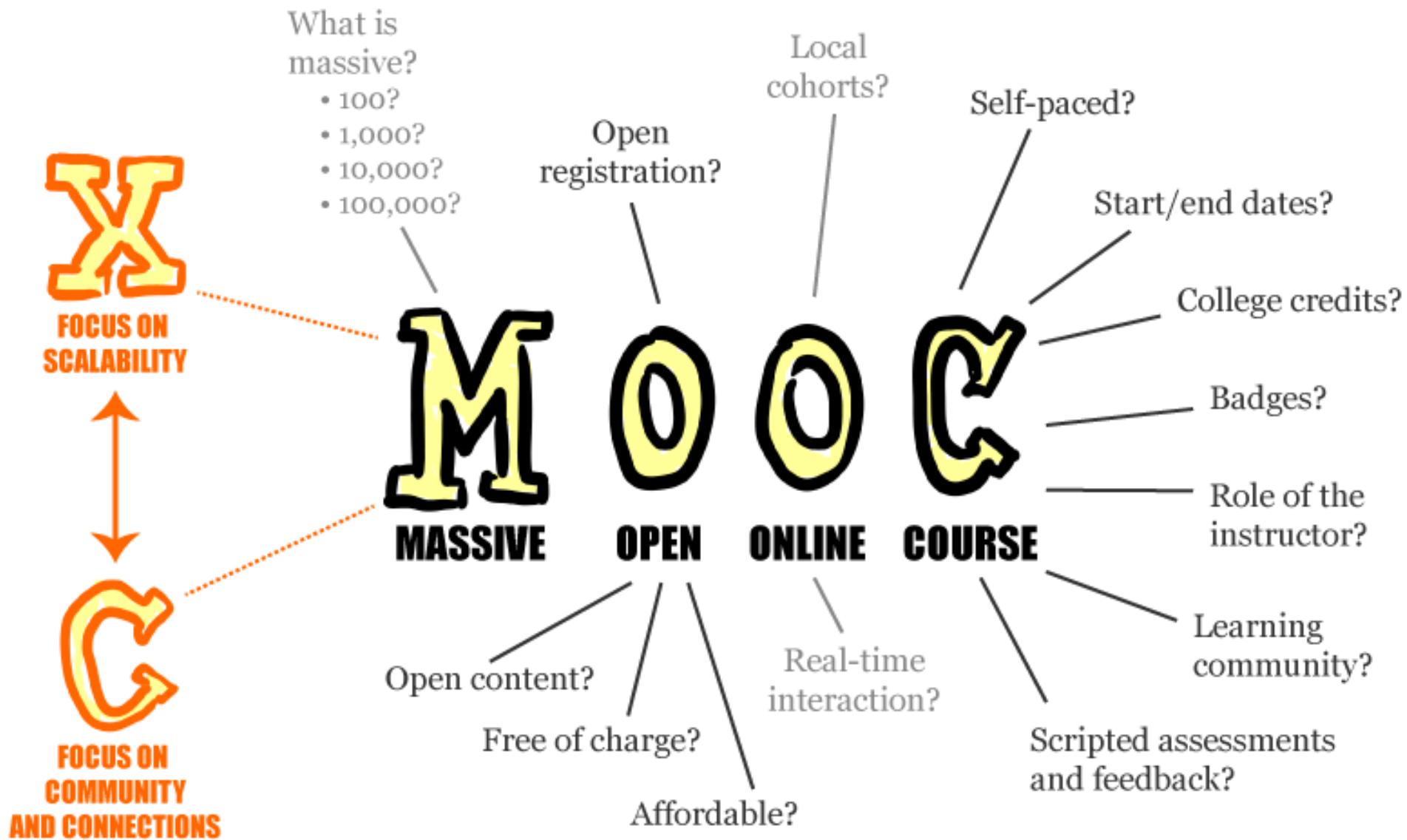


Figure 2. Lab Grades by Students' Intersectional Identities: Students in DSL Lab Sections Consistently Performed Better Than Students in Non-DSL Lab Sections



Assembled Clusters Showing 3 of the 11 Demographic Data Points: #1 Gender, #2 Underrepresented Minority (URM), and #10 Pell-Eligible Identities



OPM MARKET DYNAMICS

WINTER 2023-24



DEPARTMENTS

What We've Learned About MOOCs

Online education won't replace the residential experience, but it has a place.

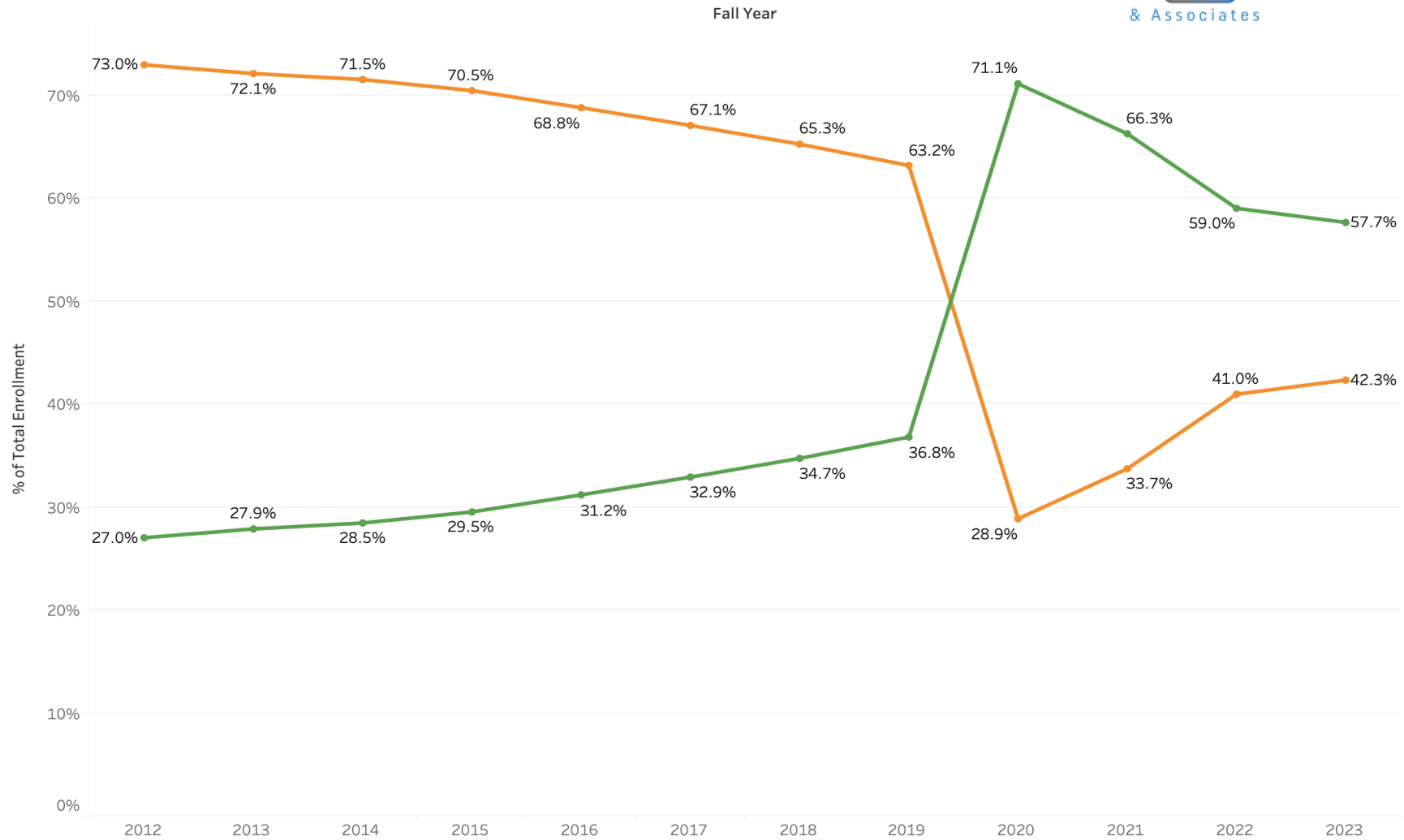
May/June 2014

Reading time 4 min



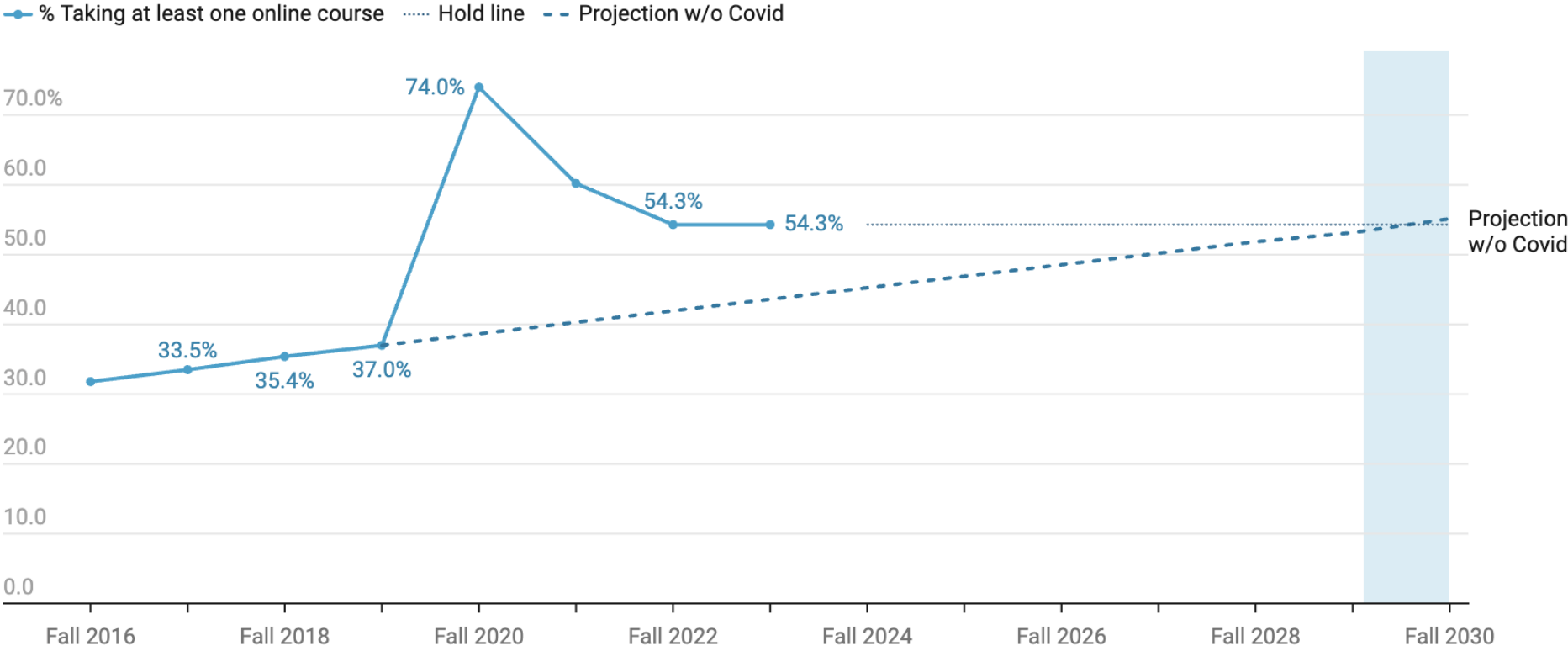
% of US Higher Ed Enrollment, Fall 2012 - 2023 of Students Taking At Least One (ALO) Online Course

Source: IPEDS database



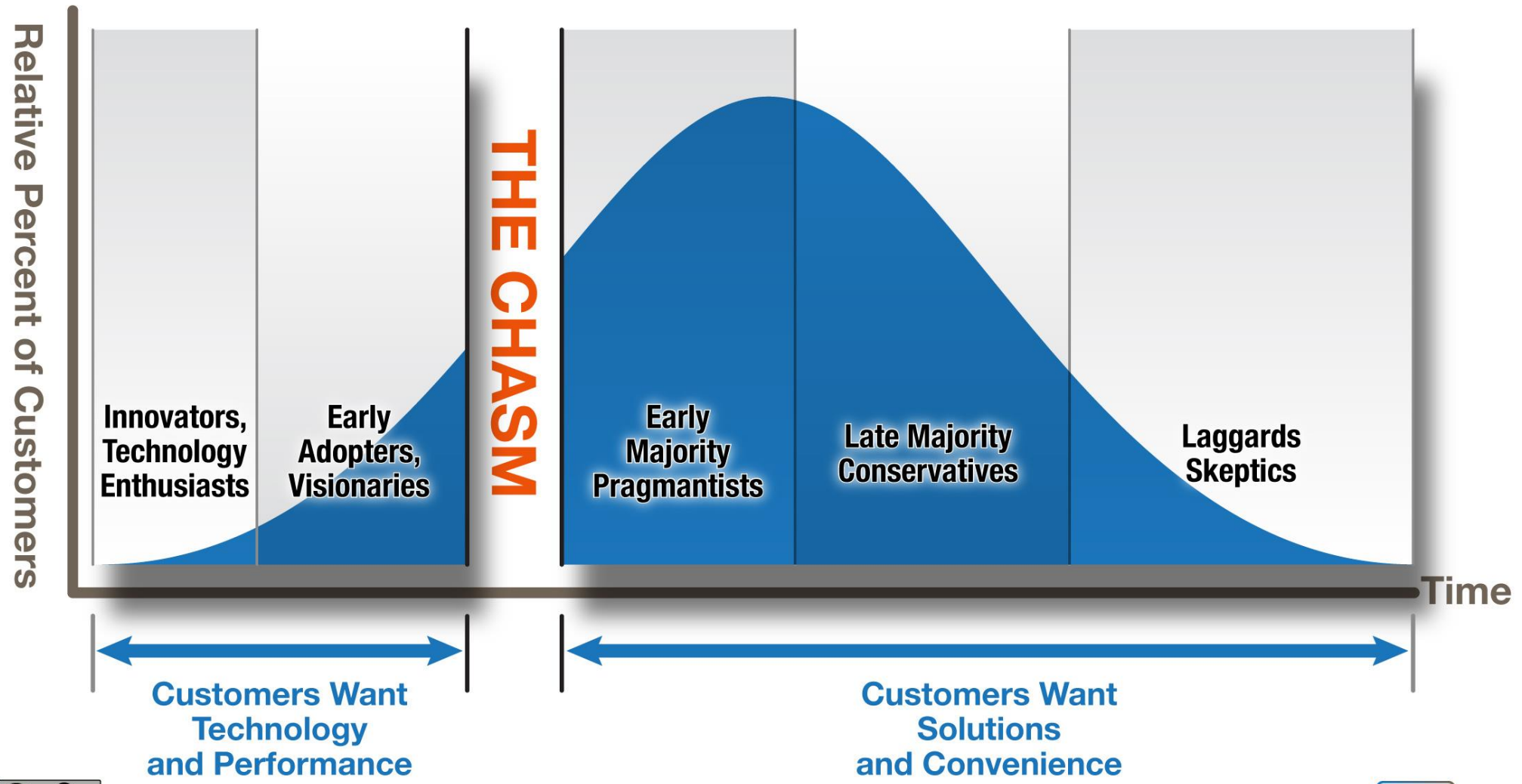
The Acceleration of Online Enrollment

The percentage of students taking at least one online course in the fall of 2023 was years ahead of where it might have been had the pandemic never happened, according to projections.



Note: Student enrollment statistics through the fall of 2023 pulled from Phil Hill's annual analysis of U.S. Department of Education data. Data projections for the fall of 2020 and onward calculated using linear growth equation.

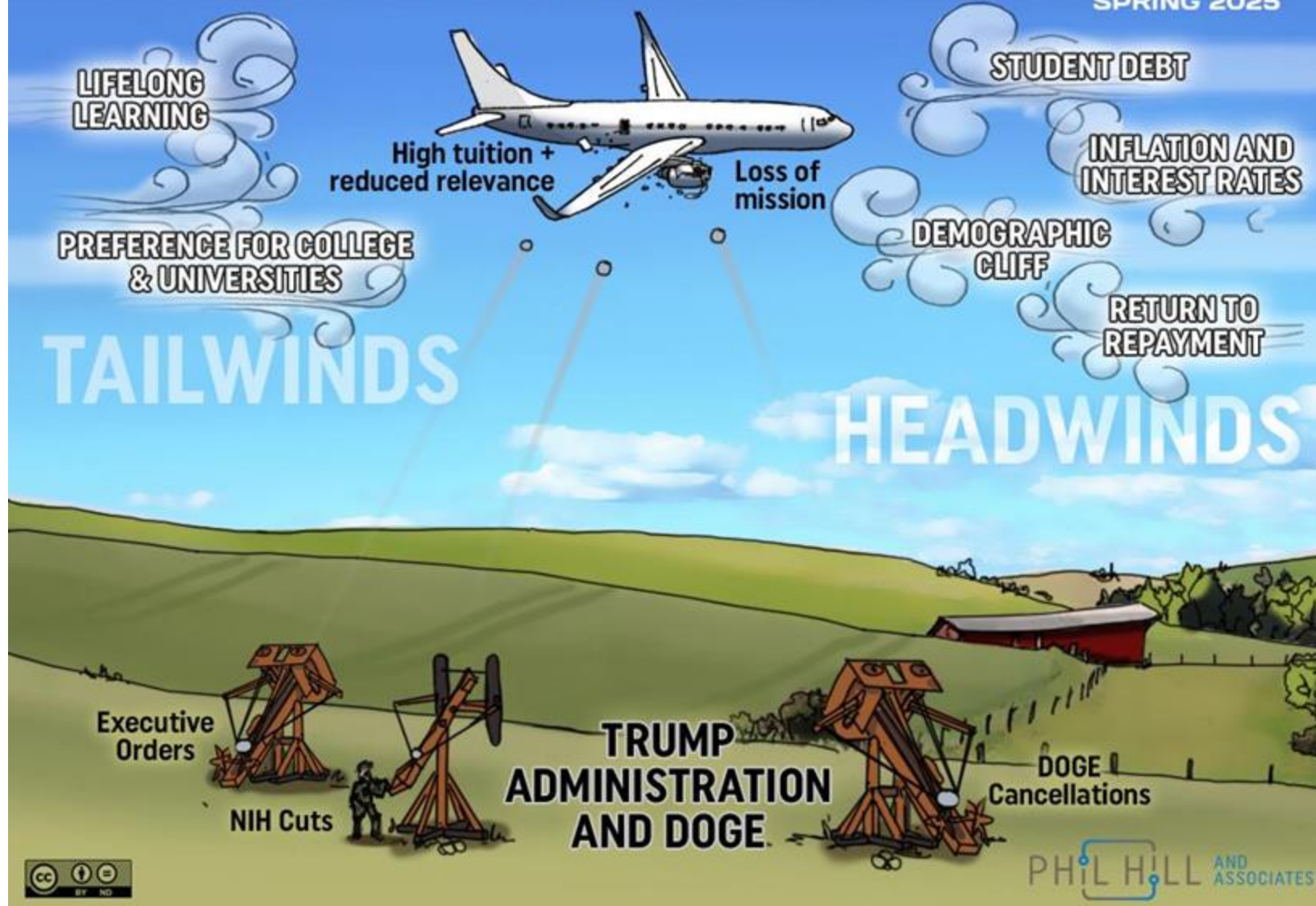
Chart: Taylor Swaak • Source: [Phil Hill](#) • [Get the data](#) • Created with [Datawrapper](#)



Based on *Crossing the Chasm* by Geoffrey Moore.

HIGHER EDUCATION TURBULENCE

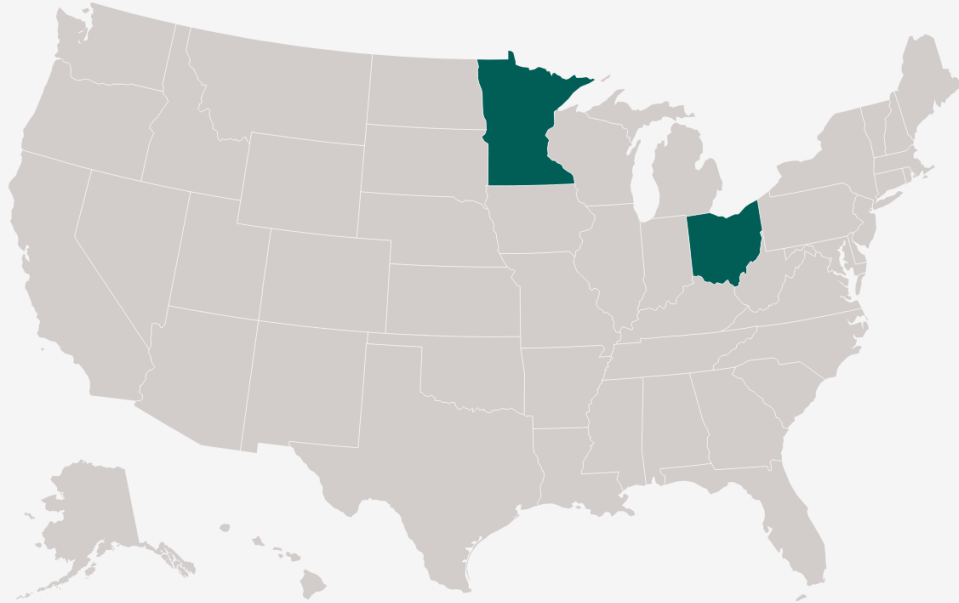
SPRING 2025



Which States Have Proposed or Passed Online Program Manager (OPM) Legislation?

Minnesota and Ohio are the only two states that have passed bills regulating OPMs.

■ Passed a bill regulating OPMs



Note: This map is based on legislation introduced as of January 1, 2025.

NEW AMERICA

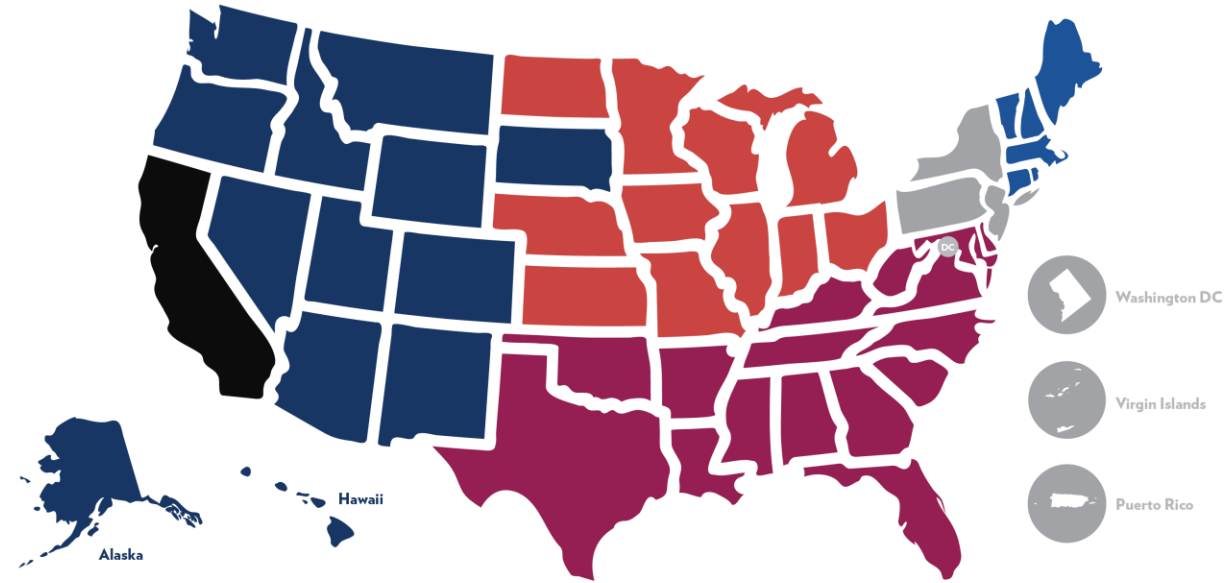
SARA Member States

LEGEND

MHEC NEBHE SREB WICHE

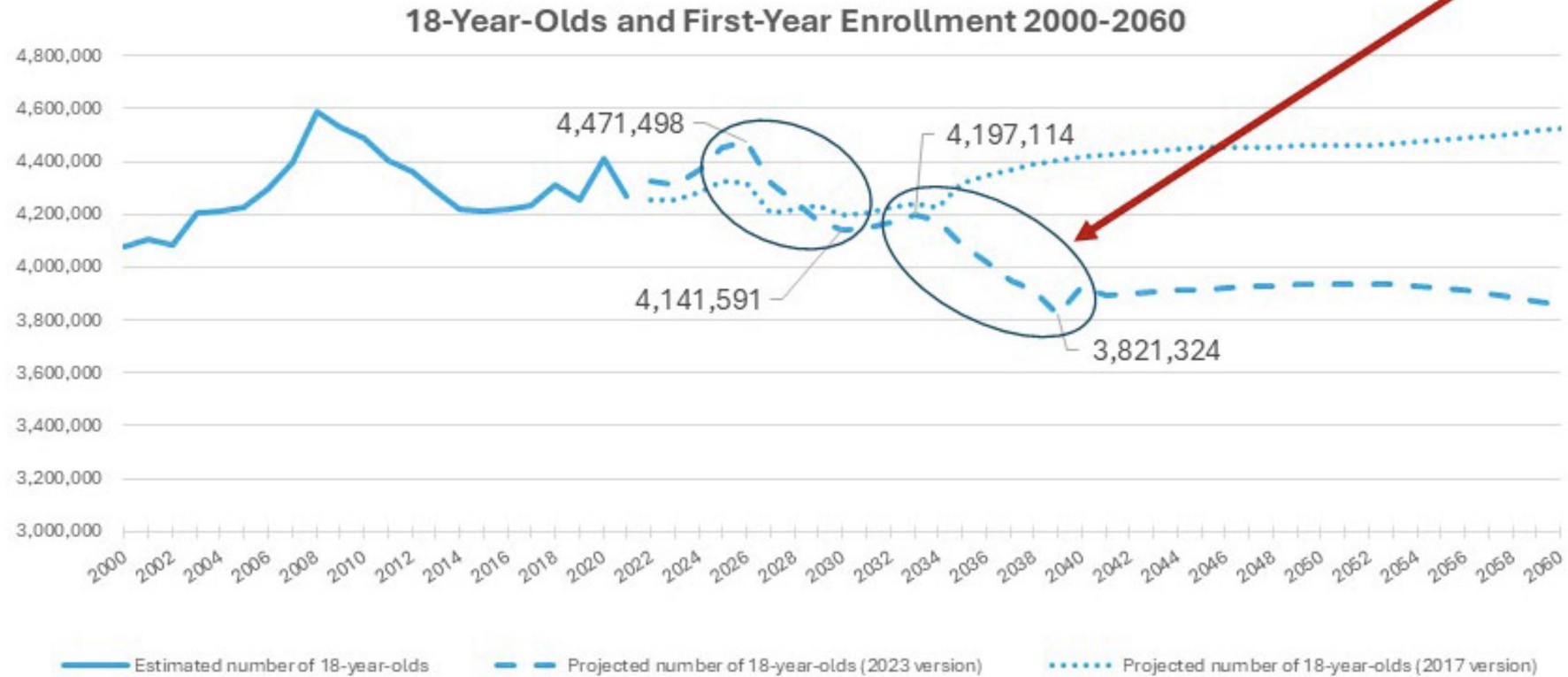
MEMBERS
of SARA; Not in a Compact

NON MEMBER



NC SARA

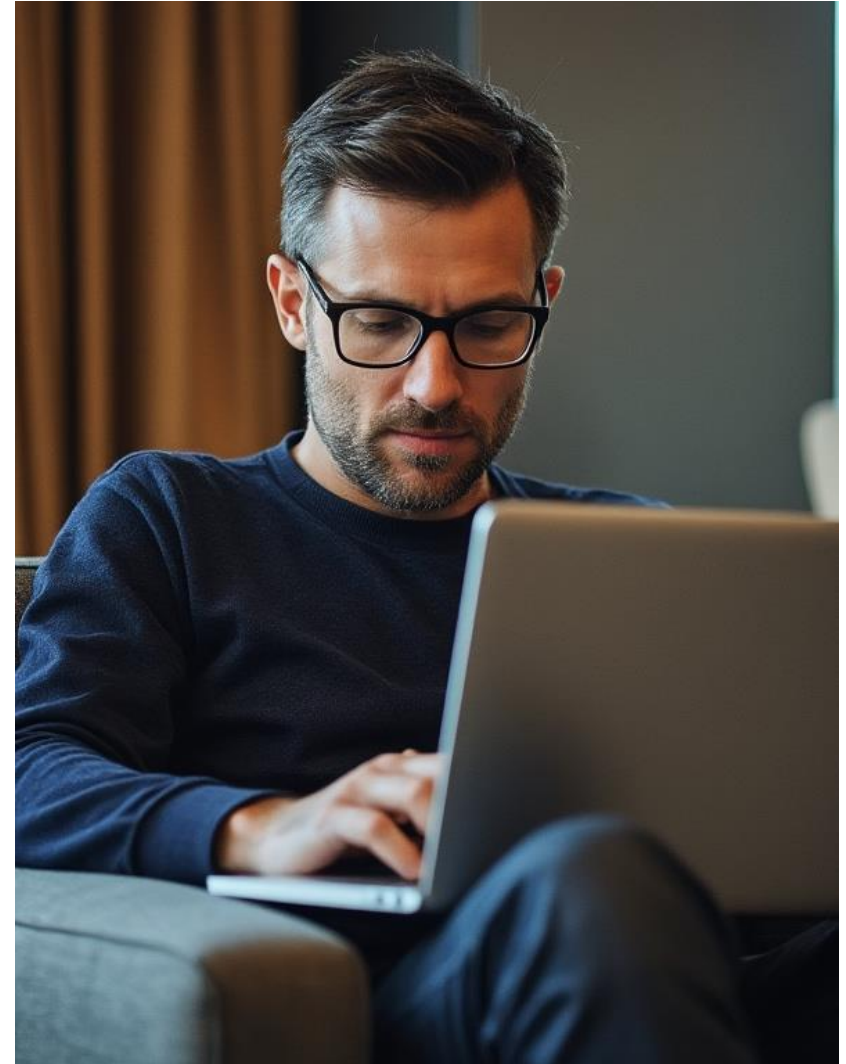
Two Demographic Cliffs



Sources: Actual and Projected College Freshmen: *Digest of Education Statistics* 2016, 2020, 2022. Estimated Number of 18-Year-Olds: U.S. Census Bureau 2017 estimates, *2023 estimates* (first to be based on 2020 census data).



#DES22



Grok 2024



From: <https://youtu.be/Oo60eg9qCIY>



From: <https://youtu.be/5mNis9-RJi8>

Motivations for building online programs



A Search for New
Revenue



New Student
Enrollment



Access



Campus
Constraints

1

Goals,
constraints
& form

It is important that before starting to think about building or outsourcing support for online programs that you are very clear about why you are doing this. Your motivations will shape many decisions.

Technology

2

Functions

Recruitment, Admissions
& Registration

Martech



CRM

Career Services



LMS



Payments &
Financial Aid

Internships &
Clinical Placement



SIS



Data &
Analytics

Communications
& Engagement

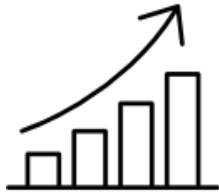


Helpdesk



Course
Development

Student support & retention & career services



Growing importance in online learning



Increasingly technology enabled



Growing role of coaching

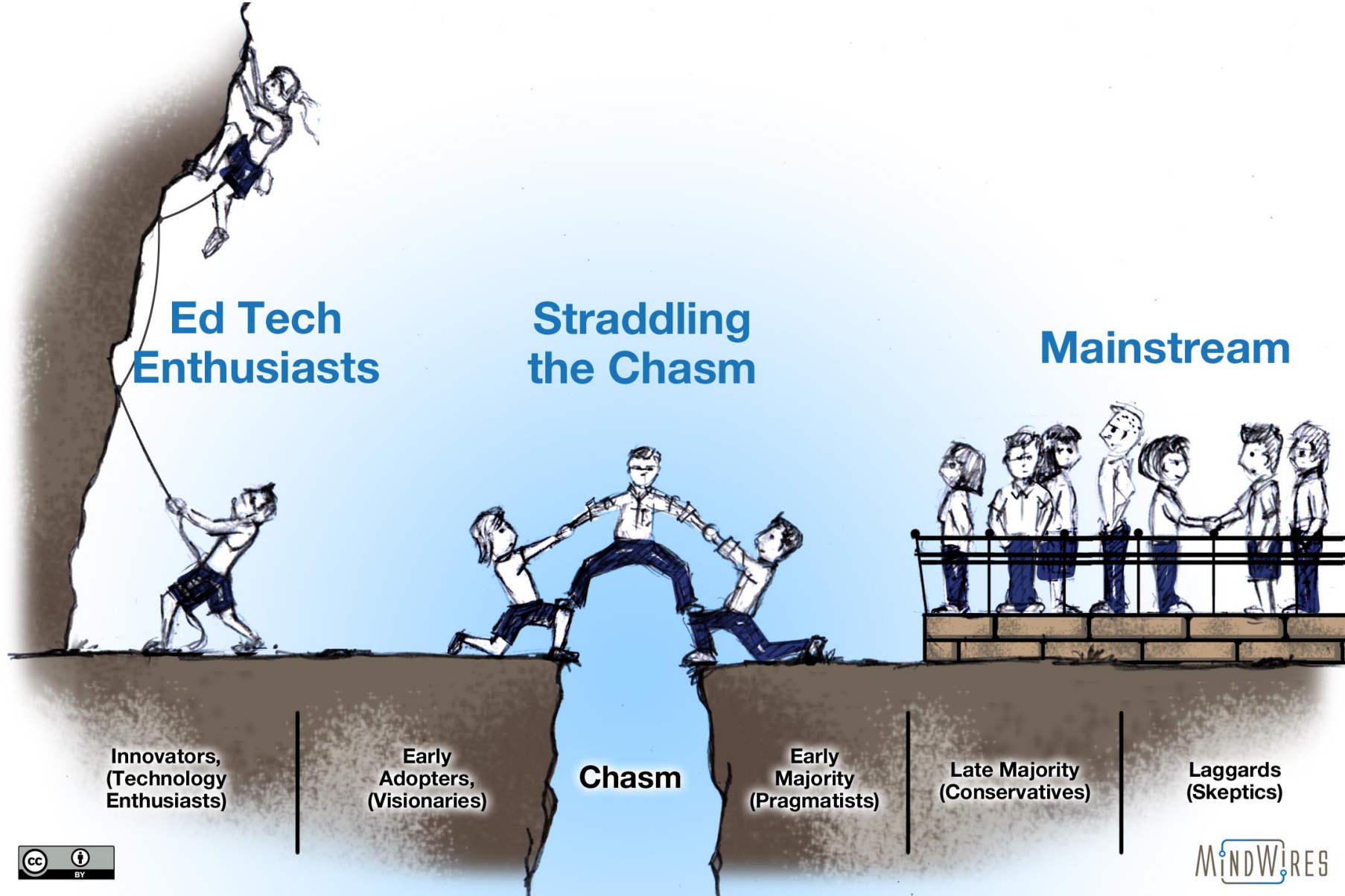


Career
Technology Stack

- Internships & clinical placement
- Mentoring
- Job portal
- Partnerships with companies

2

Functions



We are in the midst of a **new era in higher education** driven by mainstream adoption, the pandemic, new business models, and a move beyond the digitization of traditional classroom.

Email: phil@philhillaa.com

Newsletter: onedtech.philhillaa.com

Thank You!

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