Online Program Managers and Rural Higher Education Institutions: Opportunities and Challenges

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Executive Summary

Online Program Managers (OPMs) can serve as valuable strategic partners for rural higher education institutions, helping them overcome significant barriers while also presenting challenges that require careful navigation. Based on interviews with five rural university administrators and a review of current literature, this paper examines both the opportunities and challenges of OPM partnerships for rural institutions.

Rural colleges and universities face multiple challenges, including fewer college-age students, limited resources, and geographic isolation. OPMs can help address these challenges by providing expertise in marketing, recruitment, and student retention, along with crucial upfront resources for program development. This support enables rural institutions to expand their reach through online education, particularly to adult learners who may have difficulty accessing traditional on-campus programs.

However, the relationship between OPMs and universities requires careful management. Key concerns include potential tensions between institutional missions and OPM profit motives, issues of transparency and quality control, and the risks associated with long-term revenue-sharing agreements. Successful partnerships, as demonstrated by the interviewed rural institutions, share common characteristics. These include:

- Maintaining institutional control over core academic functions
- Establishing clear boundaries between academic and operational responsibilities
- Building strong relationships through regular communication
- Ensuring alignment between institutional mission and OPM objectives
- Carefully selecting partners who understand and support institutional goals

While OPMs present both opportunities and challenges, they can be effective partners for rural institutions when relationships are properly structured and managed. The key to success lies in maintaining institutional autonomy over academic matters while leveraging OPM expertise for operational support.

Introduction

Online learning in higher education (referred to as Digital Education, or DE in the Integrated Postsecondary Education Data System data) has seen steady growth since

2012 (see Figure 1). The COVID-19 pandemic caused a large spike in the number of students taking online courses, and while the number declined as the pandemic subsided, the share of students taking at least one online course remains above 50 percent and still well above pre-pandemic highs.

Figure 1. The Number of Students Learning Online Remains High

COVID reshaped college student enrollment

Student enrollment rates in digital education (DE) courses
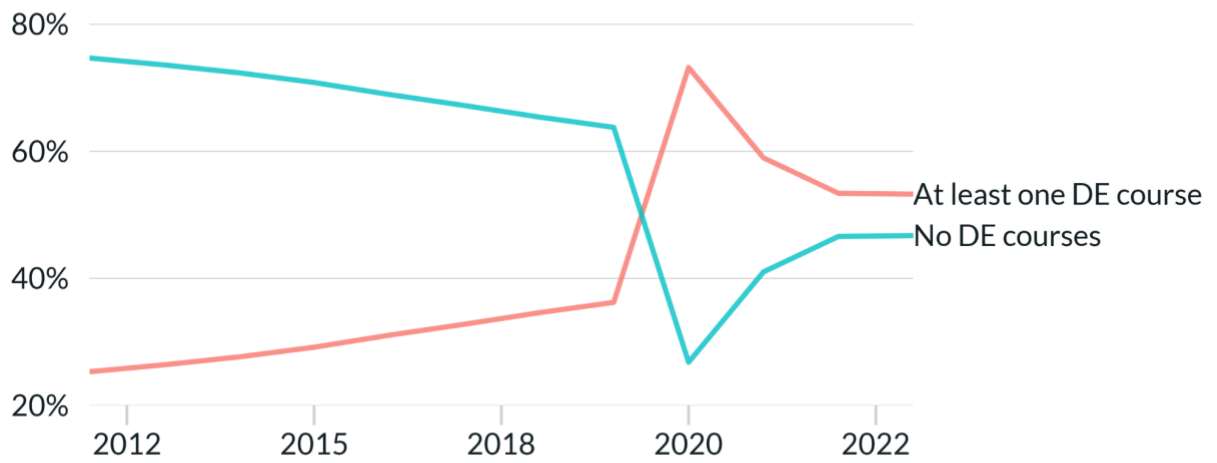
Source: Integrated Postsecondary Education Data System (IPEDS) Fall Enrollment survey.
Note: This CORI analysis is an extension of WCET analysis "The Shift in Digital Learning Modalities: Is Higher Education Ready?". 2023

Given the sharp increase in online enrollment, many colleges and universities have utilized third-party servicers such as Online Program Managers (OPMs) to provide learning management platforms, expand online course offerings, develop new degree programs, and recruit students. On February 15, 2023, the Department of Education published Dear Colleague Letter GEN-23-03: Requirements and Responsibilities for Third-Party Servicers and Institutions. The impetus for this letter was concern over potential violations of the prohibition on incentive compensation for student recruitment by third-party servicers such as OPMs.

The letter prompted immediate pushback (Knott 2023, Coffey 2024) from higher education institutions and related associations like the American Council on Education (ACE). ACE submitted a letter to Department of Education Secretary Miguel Cardona critiquing the Department of Education's guidance on behalf of over 90 organizations. A main point of contention was the overly broad definition of third-party servicers that could have negative unintended consequences. The Department of Education rescinded the Dear Colleague letter on November 14, 2024.

The scholarly literature on OPMs is very limited. Indeed, Hamilton et al. (2022) declare it to be "non-existent," and argue that OPMs' lack of visibility has hindered scholarly research on the topic. In this paper, we examine the opportunities and challenges that OPMs present with a focus on rural universities and include insights from interviews conducted with five rural university administrators who have experience working with OPMs (see Appendix A: Methods and Appendix B: University Profiles). Rural colleges and universities face unique challenges like a smaller pool of prospective students and a higher proportion of adult learners. Online education can allow rural schools to recruit students outside of their local area, and the flexibility of online learning is necessary to attract adult students who are already in the workforce. It is critical to consider the rural higher education landscape to provide a more complete picture of the opportunities and challenges of online learning. The paper's goal is to shed light and bring nuance to this complex issue while highlighting the real-world experiences of rural universities engaged in OPM partnerships.

The Rural Higher Education Landscape

The rural higher education landscape is characterized by a diverse mix of community colleges, regional public universities, and a smaller number of private institutions that serve geographically dispersed populations. These institutions play a critical role in workforce development, often focusing on practical, career-oriented programs tailored to local economic needs. However, rural colleges face unique challenges, including limited resources, declining enrollments due to demographic changes and population shifts, and difficulties in attracting and retaining faculty.

Rural institutions tend to be smaller and less well-resourced than those in larger metropolitan areas. Regional public institutions, such as those likely to be located in rural areas, get less state financing than flagship public universities (Marcus et al. 2024). Koricich et al. (2020) suggest that states need to add special funding provisions for rural regional public universities to overcome the disparities in state appropriations. Small private institutions, such as those the administrators interviewed in this paper were drawn from, receive no state funding at all. Dr. David Barnett, President of Brenau University in Georgia, noted that "for private schools, since we get no appropriations from the state, all of our instructional costs are directly paid by the students' tuition."

Coupled with the looming "enrollment cliff" (Bauman 2024), rural education institutions face enrollment challenges on multiple fronts. Rural high school graduates consistently enroll in college at lower rates than their non-rural counterparts (Wells et al. 2023). A report on the tech employment landscape in the United States found that cost and time commitment are major barriers that rural learners face when seeking education and training (Center on Rural Innovation 2022). The demographics of rural areas are also an issue, as such places tend to have older populations and a lower share of college-aged residents (Smith & Trevelyan 2019). The average age of residents in rural communities is 51, compared to 46 for those in metro regions (National League of Cities 2018), and

rural residents are less educated with 20 percent holding a Bachelor's degree compared to 34 percent for their metropolitan counterparts (Koricich et al. 2020). Rural areas have also faced many years of population decline (USDA Economic Research Service 2025). Shrinking enrollments at some rural schools have led to the elimination of majors and programs (Marcus et al. 2024) in efforts to stave off financial crises and even closures. For example, SUNY Potsdam in rural St. Lawrence County New York recently cut nine academic programs in the face of a budget shortfall (Bauer-Wolf 2023). Another rural New York school, Wells College in Aurora, abruptly closed due to insufficient revenue to sustain operations (Moody 2024).

The relative geographic isolation of rural institutions (and rural adult learners) can also have an impact on the ability of schools to attract students to campus. Rural counties tend to have older populations: Rural residents have just as much confidence in the value of higher education as their non-rural counterparts, but find it much less accessible. (G.R.O.W. Report 2024). Campbellsville University in Kentucky is known for its graduate education programs, which typically serve working teachers looking to further their education. Dr. Shane Garrison, the Dean of Campbellsville University Online stated that for such students, "there is no feasible way for them to travel to the middle of Kentucky" to attend the graduate school.

Rural higher education institutions have increasingly embraced online education to overcome geographic and demographic challenges, expanding access for students who live far from campus or face transportation barriers. By offering flexible, internet-based programs, these institutions can serve non-traditional learners, including working adults and those seeking reskilling opportunities. This shift has been supported by investments in broadband infrastructure, enabling rural colleges to reach broader student populations and sustain enrollments amid shifting demographics.

The landscape of online education has evolved significantly since its emergence at the turn of the millennium when the rise of open-access resources and distance learning initiatives marked its beginnings (Czerniewicz & Walji, 2019:4). Over the past decade, this educational sector has experienced dramatic growth in offerings and student participation (Hamilton et al., 2022). Rural higher education institutions may lack the capacity and expertise to provide new online offerings. Dr. Garrison indicated that, given Campbellsville University's rural location, it would be a struggle to find skilled employees to fulfill the necessary functions of online programming. Partnership with an OPM has helped them to fill these gaps.

OPMs as Strategic Partners

OPMs are for-profit enterprises that conduct the work related to online education (Cheslock et al. 2021). This may include student recruitment, enrollment assistance, and marketing of programs, as well as course design, instruction, student advising, and assessment of students. In a recent study, Sun et al. (2024) surveyed 36 Chief Online

Learning Officers who had experience working with OPMs to identify which services were most needed. Their findings revealed six key services in order of importance: marketing ranked highest, followed by recruiting, upfront capital, market analysis, student retention, and data reporting. Small rural schools may lack the personnel and expertise to provide these functions in-house, and local conditions - like a constrained labor market - may make hiring for such positions difficult or impossible. The services offered by OPMs are variable and depend upon the specific strategic needs of the institutions that they contract with. For example, the institutions we interviewed use OPMs for marketing, recruitment, enrollment, and student retention, but not admissions, course development, instruction, or student assessment.

Researchers identify two basic models for OPM agreements: fee for service and revenue share (Mattes 2017, Hall & Dudley 2019, Czerniewicz & Walji 2019, Acosta et al. 2020, Cheslock et al. 2021). In Mattes' (2017) study, she finds that platform providers typically charge a lump sum using the fee-for-service model. Revenue share agreements are more common when OPMs provide services like course design and materials, student recruitment, and marketing. Such agreements typically have at least a five-year term (Cheslock et. al 2021, Hall 2022, Sun et al. 2024), and usually have options to extend the contract. In a study of over 70 contracts between OPMs and institutions, Hall and Dudley (2019) find that 56 percent of relevant contracts have terms of five or more years, with six contracts having terms of seven to ten years.

The percentage of revenue captured by OPMs varies, ranging from a typical 50/50 share (Hall & Dudley 2019) to as much as 80% of program revenue potentially going to the OPM (Berman 2019). Such agreements are attractive to institutions because the OPM will typically pay the upfront costs (which can be considerable) to develop and launch an online program. This provision of financial resources is a major reason that resource-constrained colleges and universities contract with such third-party servicers.

Opportunities for Rural Institutions and Students

Partnership with an OPM can provide opportunities for rural colleges and universities to capture essential revenue by helping them recruit new students in the face of declining populations and increasing costs (Zacharakis et al. 2014). Such partnerships can also provide opportunities for students by expanding access to higher education for students who are not well-served by conventional education.

In a recent study, 76 percent of rural workers surveyed (n=1000) agreed that higher education and continuing higher education were worthwhile, yet only 48 percent indicated satisfaction with the accessibility of educational opportunities. In contrast, 76 percent of nonrural workers (n=986) were satisfied with their access to education (G.R.O.W. Report, 2024). Online programming can help to close this opportunity gap.

All the administrators we interviewed noted the changing demographics of the student population, particularly the increase in adult learners. These learners are typically part of the workforce, so participation in conventional, synchronous education can be especially challenging for students who need to juggle employment and family responsibilities.

Dr. Garrison noted the impact that online programming has on Campbellsville's Graduate School of Education, the university's largest program base. The average age of Campbellsville's online students is 28 years of age, and many are working teachers seeking to further their education. He stated:

> "I can guarantee you if we were asking these graduate school of education students to come to campus, our numbers would be absolutely destroyed, because they're full-time educators, often 28-29 years of age… and they're in school districts all over the state of Kentucky, east to west, north to south. So, there is no feasible way for them to travel to the middle of Kentucky for an in-person class. So, it really is the only way for us to flourish in that regard, age demographic and really where they are positioned in our state."

Dr. Michael Hoffman of St. Bonaventure University in New York noted that most of their online graduate students were also working adults, and stated "I think in the graduate space, if you're not doing online, I don't know how you make a go of it." An online program administrator from a small university in South Carolina [1] stated that 85-90 percent of their online students were adult learners for whom the flexibility and asynchronous nature of online education were necessary.

Another opportunity online education presents is the potential for institutions to capture shares in this growing market, and diversify their revenue streams through new offerings (Acosta et al. 2020). Online programming enables institutions to develop academic offerings that directly respond to workforce demands, preparing students for high-quality careers in growing fields. This approach is exemplified by three of the five universities interviewed for this study, which have strategically launched online undergraduate and graduate programs in high-demand disciplines such as computer science, information technology, cybersecurity, and nursing

All the administrators interviewed for this paper indicated that their partnership with an OPM has helped them to increase enrollment, scale their online programs, and react to competitive pressures. Dr. Hoffman (St Bonaventure University) stated, "really the biggest thing is it's helped us scale this and grow our enrollment significantly, in a way that hasn't forced us to add a lot of infrastructure." Dr. Garrison (Campbellsville University) noted that their OPM "has been absolutely essential" in helping their online enrollment to grow.

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[1] This interviewee preferred that they, and their school, remain anonymous.

Linfield University in Oregon contracts with Carnegie to market its online programs. Linfield is well known for its nursing school and offers an online RN (Registered Nurse) to BSN (Bachelor of Science in Nursing) program. Dr. Garry Killgore, Linfield's Online and Continuing Education Program Developer, noted that they face intense competition from community colleges that recently started offering BSN degrees, and their relationship with Carnegie has helped them to maintain a robust digital presence to help attract students.

OPMs can bring efficiencies of scale to their university partnerships. For example, one of the primary functions that OPM Risepoint handles in its partnerships with Brenau University and Campbellsville University is marketing. Dr. Barnett noted that the partnership provides Brenau with a much broader reach in marketing and lead generation than Brenau could achieve on its own. Dr. Garrison stated that Risepoint's annual investment in Campbellsville's marketing far exceeds what the university could afford to spend.

Challenges and Pitfalls

Several critiques have been levied against OPMs in the literature and press, including lack of transparency, predatory practices, and loss of institutional control (e.g. Mattes 2017, Berman 2019, Hall & Dudley 2019, Hamilton et al. 2022, Blinder 2024). It is important to note that arrangements between schools and OPMs are highly variable, and as such it is impossible to levy blanket critiques of OPM arrangements. However, one common thread of critique is the tension between the mission of nonprofit educational institutions and the motive of for-profit companies.

A recent New York Times article (Blinder 2024) highlighted the issue of OPM staff providing instruction without disclosure. In this instance, Simplelearn, an OPM, provided instruction and course facilitation for a cloud computing bootcamp offered by Caltech in Pasadena, California. Students expressed dissatisfaction with the quality of instruction and took issue with the lack of transparency regarding the OPMs central role in the course. Communications and branding led students to believe that the $9,000 bootcamp would be taught by Caltech faculty. In one case, a Caltech student discovered that the instructor was a recent graduate of the online program. Hamilton et al. (2022:4) noted that the lack of transparency prevents students from determining whether their instructors are credentialed institution faculty or OPM employees and compromises their ability to evaluate program quality. While these examples are not drawn from rural institutions, they offer a cautionary tale of how the profit motives of OPMs and the need for schools to capture revenue can act in synergy to compromise the core academic mission of higher education institutions.

Administrators we interviewed noted areas of friction with OPMs that are related to the tensions between the mission of for-profit enterprises like OPMs - maximizing profit and shareholder value - and those of nonprofit higher education institutions. Dr. Barnett (Brenau University) highlighted the misalignment of these missions as the biggest challenge in university/OPM partnerships.

Dr. Garrison (Campbellsville University) provided an example of this tension. He related that Risepoint maintains full control of marketing for Campbellsville's online programs. At one point the OPM wanted to utilize a social media influencer in Campbellsville's marketing campaign, but the influencer was promoting things that were counter to Campbellsville's mission as a Christian faith-based institution, leading to some tension. Dr. Garrison also noted that he has surfaced ideas for relational marketing with Risepoint, but has no control over whether or not they will be implemented, and such decisions are made based on Risepoint's return on investment.

Risepoint also determines staffing levels and allocation for roles like online program academic advisors at Campbellsville. They use an industry standard of one advisor for every 300 students, whereas Campbellsville's internal advising employs a ratio of one advisor for every 30 students. The heavy advising burden has caused friction between the university and the OPM, as students need to be scheduled faster than the OPM advisors can accommodate, leading to Campbellsville pressing the OPM to schedule students more quickly.

Dr. Hoffmann (St. Bonaventure University) also offered insight into these tensions. He stated that the goals and incentives of the university and OPM are sometimes misaligned. For example, the OPM may prioritize maximizing enrollment in certain programs, while the university may have other priorities. Dr. Hoffman noted that the corporate nature of OPMs makes them more market-sensitive and nimble than a typical university, which means they may move more quickly to shut down financially underperforming programs.

Dr. Garrison echoed the concern about program closures and noted that OPMs are starting to close out contracts at a higher rate due to lack of profitability. This may leave schools in a position where they owe significant debt to the OPM but no longer have the infrastructure and support to serve online students, making it nearly impossible for small, rural institutions to sustain online operations when the partnership with the OPM ends.

The issues detailed above are serious, but they are not inevitable outcomes of a university/OPM partnership. Rather they are the result of particular choices made by institutions and OPMs. These issues underscore the importance of schools maintaining control over their core academic functions and structuring agreements with OPMs that protect the quality of instruction and foreground transparency. OPMs can bring critical capacity and expertise to partnerships, but institutions must carefully manage the relationship to ensure it is in service to their educational mission.

Lessons Learned and Best Practices

A key finding emerged from our administrator interviews: each institution deliberately maintained complete control over its core educational functions while leveraging OPM partnerships only for supporting operations. Universities retained exclusive oversight of essential academic activities, including admissions, curriculum design, course content, instruction, and student assessment, keeping these responsibilities with university faculty and staff rather than OPM partners.

The importance of developing and maintaining strong relationships with OPMs surfaced in nearly every interview. Frequent contact and open lines of communication were themes that interviewees regularly touched on. All administrators characterized their OPM partners as very responsive and accessible.

Administrators reported that the term of their revenue share contracts ranged from five to seven years. Some authors (e.g. Czerniewicz et al. 2019, Acosta et al. 2020, Villalobos 2023) have viewed the term length of OPM contracts in a negative light. While their concerns over issues such as an institution being trapped in an unfavorable contract for several years may be valid, the interviewed administrators indicated that the term lengths were conducive to building strong relationships with OPM staff. Dr. Michael Hoffman of St Bonaventure University stated:

> "One of the most important factors to the success I've had with Keypath is the managing director on the other end that I work with. She and I have worked on the account for seven years together, so we know each other very well. We meet weekly. We're messaging. We're constantly in communication. That relationship has to be solid for it to work."

Dr. Shane Garrison of Campbellsville University characterized the relationship with their OPM as having a high degree of "interwovenness," with frequent communication and collaboration. He noted that Risepoint staff are very accessible to Campbellsville leadership, who can reach even high-level staff by text or phone. Dr. Garry Killgore of Linfield University characterized Linfield's fee-for-service engagement with Carnegie as a positive and collaborative partnership, noting that they have provided useful advice to Linfield that didn't necessarily benefit Carnegie.

Selecting the right OPM partner emerged as a critical factor for success. Dr. Barnett explained that Brenau University has experience with six different OPMs throughout its history. He emphasized that effective partnerships occur when OPMs understand and actively support the university's core mission, rather than viewing the institution as merely serving their business objectives, and commended Risepoint for their collaborative approach with Brenau. This fundamental alignment of perspectives is essential for a successful University/OPM partnership.

Conclusion: Moving Forward with Informed Decisions

OPM partnerships can unlock opportunities for rural higher education institutions and rural learners. OPMs bring capacity and expertise that can help rural schools to build online programs that can increase enrollment, boost revenue, and respond to market demand. Such partnerships can also provide opportunities for rural learners who are underserved by conventional on-campus programs and allow them to gain in-demand skills and credentials that can bolster their career opportunities.

OPM partnerships can also present challenges to rural schools. The fundamental tensions between the missions of nonprofit universities and for-profit OPMs have the potential to cause serious problems, especially when the OPM gains control of the core academic functions of the institution.

The experiences of the administrators interviewed for this study demonstrate that successful OPM partnerships are possible when institutions maintain clear boundaries and strong oversight. Key elements of success include retaining control over core academic functions, establishing strong relationships with OPM staff, and selecting partners whose approach aligns with institutional values and mission.

As the higher education sector continues to evolve, particularly in rural areas, OPMs will likely remain important strategic partners for many institutions. However, universities must approach these partnerships with a clear understanding of both the opportunities and risks involved. This means carefully structuring agreements to protect institutional autonomy, maintaining strong oversight of OPM activities, and ensuring that partnership decisions are driven by educational mission rather than purely financial considerations.

Moving forward, institutions considering OPM partnerships should:

- Carefully evaluate potential partners for mission alignment
- Maintain control over core academic functions
- Establish clear boundaries and expectations
- Develop strong communication channels

With thoughtful implementation and intentional management, OPM partnerships can help rural institutions expand their reach and impact, and better serve rural learners, while maintaining their educational mission and standards of quality.

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Appendix A: Methods

We began with a list of six rural college administrators who had provided comments on OPMs to the Department of Education. To supplement this group, we then identified nine additional universities comparable to the initial six in terms of rural setting and size. Five of the 15 administrators queried agreed to an interview: Dr. David Barnett, President of Brenau University (Georgia); Dr. Shane Garrison, Dean of Campbellsville University Online (Kentucky); Dr. Michael Hoffman, Dean of the School of Graduate Studies St. Bonaventure University (New York); Dr. Gary Killgore, Online and Continuing Education Program Developer from Linfield University; and an online program administrator from an institution in South Carolina who preferred to remain anonymous.

All the universities included in the study serve rural areas and have total enrollments ranging from 1400 to just under 10,000 students. There was a wide variation in the number of students enrolled in online programs, ranging from 15 to 1700. Three of the universities currently have revenue share contracts with OPMs: Brenau University, Campbellsville University (both with Risepoint), and St. Bonaventure (Keypath Education). Linfield University engages two third-party servicers for marketing (Carnegie) and market research (UQ Solutions) on a fee-for-service basis. The university in South Carolina does not currently contract with an OPM, but they have done so in the past.

Semi-structured interviews were conducted via Zoom. Interviews were recorded, transcribed, and analyzed to identify common themes.

Appendix B: University Profiles

Campbellsville University

Located in Campbellsville, Kentucky, Campbellsville University is a private Christian institution founded in 1906. As of 2023, the city of Campbellsville has an estimated population of 11,653 residents. Campbellsville University offers both undergraduate and graduate in-person and online programs, with a total enrollment of approximately 10,000 students.

St. Bonaventure University

Situated in St. Bonaventure, New York, St. Bonaventure University is a private Catholic university established in 1858. The university is located in the town of Allegany, which had an estimated population of 7,387 as of 2023. St. Bonaventure offers both undergraduate and graduate in-person programs, and graduate online programs, with a total enrollment of approximately 2600 students.

Linfield University

Based in McMinnville, Oregon, Linfield University is a private university initially founded as the Baptist College of McMinnville in 1858. As of 2023, McMinnville has an estimated population of 34,450 residents. Linfield offers in-person and online undergraduate and graduate programs with a total enrollment of approximately 1400 students.

Brenau University

Located in Gainesville, Georgia, private Brenau University operates multiple campuses, including its main campus in Gainesville. Brenau University was initially founded as the Georgia Baptist Female Seminary in 1878. Gainesville has an estimated population of 47,265 residents. Brenau offers in-person and online undergraduate and graduate programs with a total enrollment of approximately 2500 students

University 5

This university located in South Carolina preferred to remain anonymous. They offer in-person and online undergraduate and graduate programs.