

Welcome to #WCETWebcast

September 26, 2019

The webcast will begin shortly.

There is no audio being broadcast at this time.

An archive of this webcast will be available on the WCET website next week.



SEPTEMBER 26

Navigating the OPM
Marketplace: Picking
the Right Partners
While Avoiding
Market Chaos

Welcome!

Use the question box for questions and information exchange.

Archive, PowerPoint, and Resources available will be next week.

PowerPoint can be downloaded via the link in chat.

*Follow the Twitter feed:
#WCETWebcast.*



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Director, Programs & Sponsorship

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Overview

01

Introductions

02

Background on
OPM
marketplace
and services

03

Current
landscape

04

Audience Q&A

05

Conclusion





Questions from the Audience

If you have a question during the presentation, please add your questions to the question box.

We will monitor the question box and have time for Q&A at the end of the webcast.

Moderator

@meraymond

Megan Raymond

Director, Programs + Sponsorship

WCET

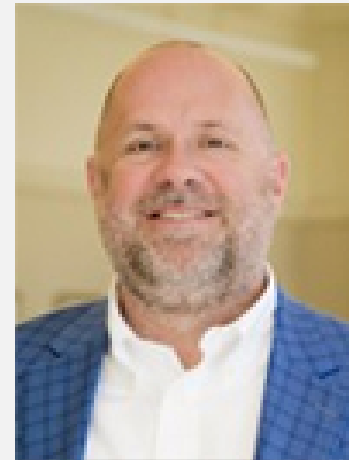


Speaker

@PhilOnEdTech

Phil Hill

Mindwires Consulting



<http://bit.ly/wcethill19>

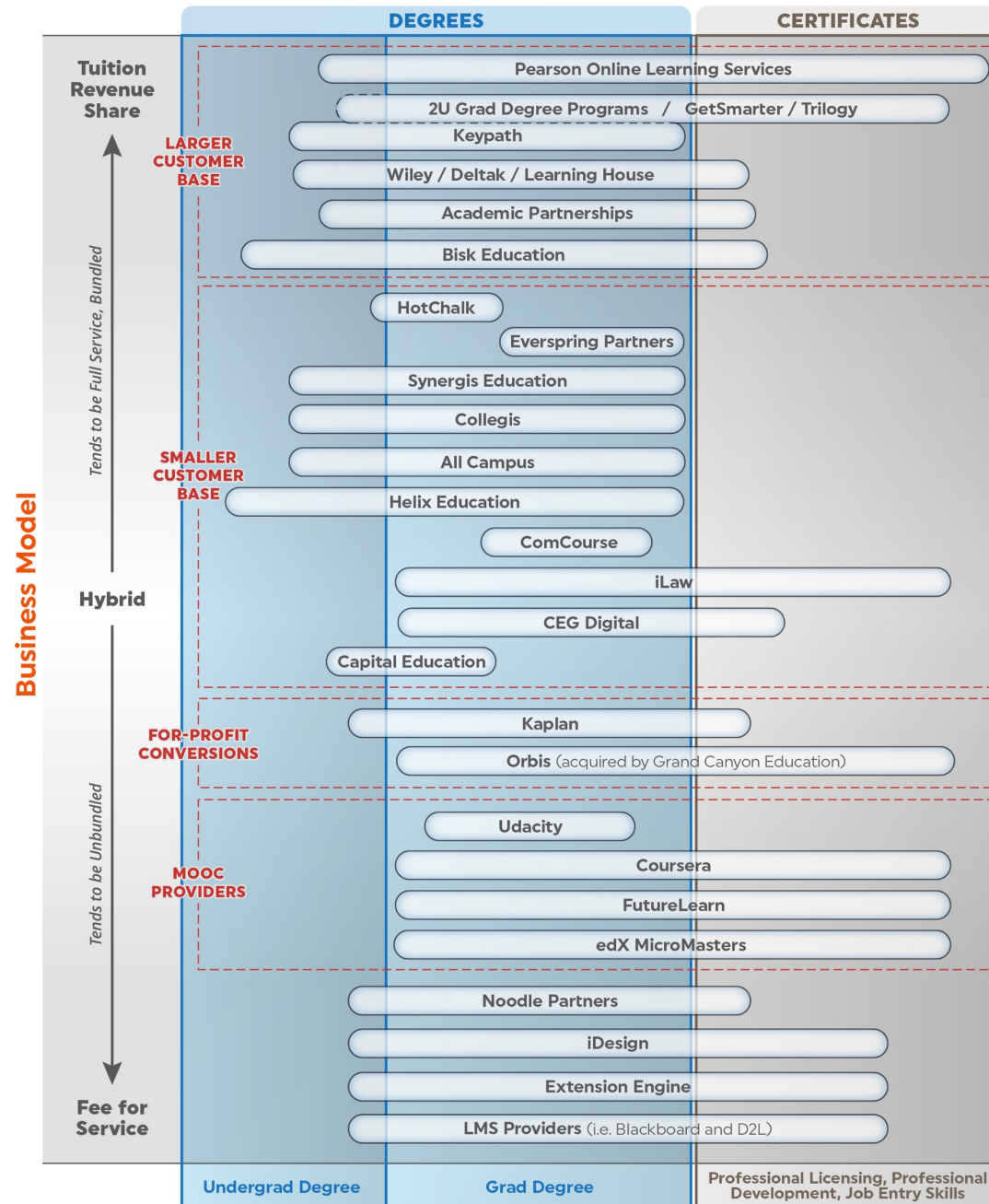


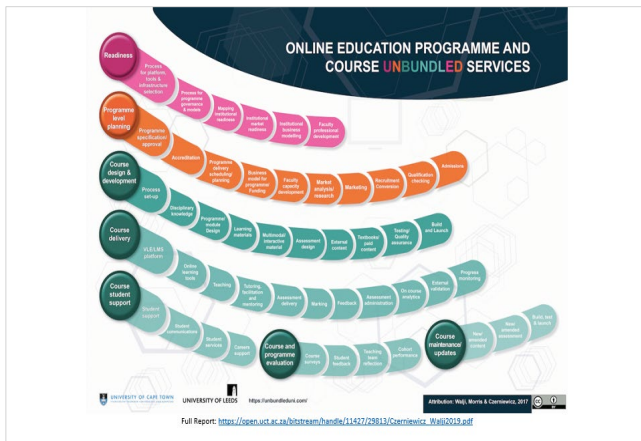
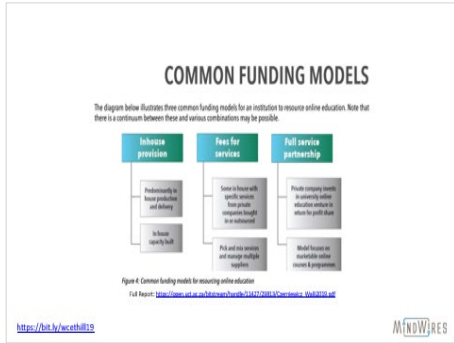
Primary Services

- Marketing & Recruitment & Market Research (but not admissions).
- Course & Curriculum Design (but in vast majority of cases, not the instruction).
- Student Support Services (call center / help desk, retention services, degree pathway, etc).
- Technology Infrastructure & Analytics (most are now LMS agnostic, different than the past).

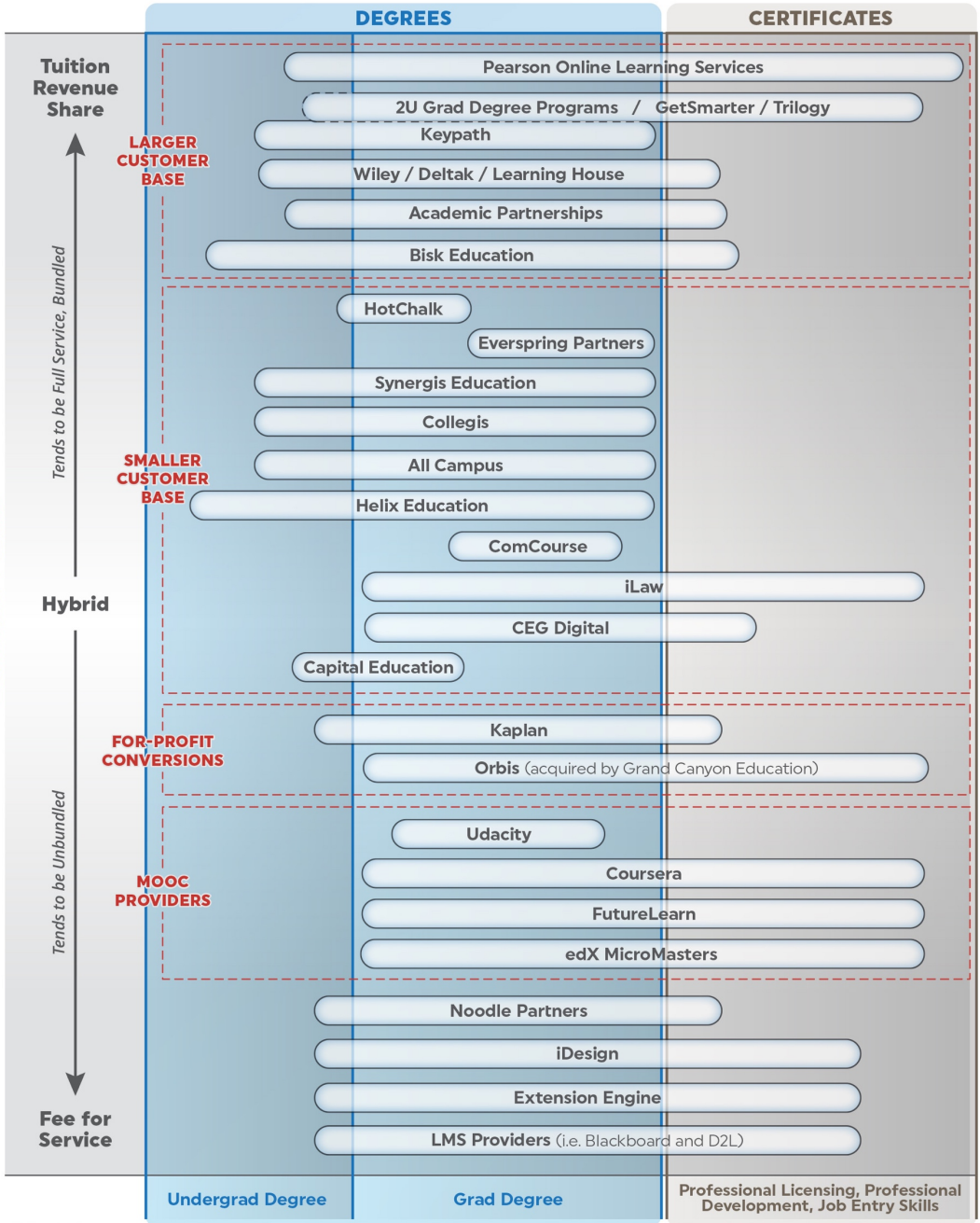
Online Program Management Market Landscape

FALL 2019
EDITION





Business Model



Market Origins 1990s

- Mid 1990's: Regis University Online MBA with Bisk Education.
- Deltak founded 1997.

<https://bit.ly/wcehill19>

Suggested Definitions

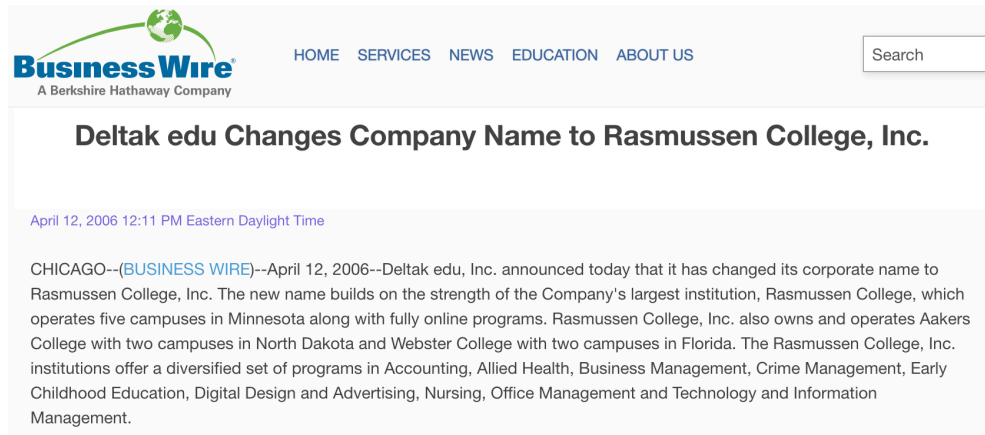
- Online Program Management (OPM): Service providers who act as the primary partner to enable a higher education institution to create and / or deliver an online program; typically offering full-service, bundled offering.
- Online Program Enablement (OPE): Service providers who act as the primary partner to enable a higher education institution to create and / or deliver an online or hybrid program; typically offering a significant subset of services.
- Courseware, LMS, General EdTech, Technology Development & Integration: While important, these are not the same as OPM or OPE.

<https://bit.ly/wcehill19>

Market Origins

1990s

- Mid 1990's: Regis University Online MBA with Bisk Education.
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Deltak edu Changes Company Name to Rasmussen College, Inc.

April 12, 2006 12:11 PM Eastern Daylight Time

CHICAGO--(BUSINESS WIRE)--April 12, 2006--Deltak edu, Inc. announced today that it has changed its corporate name to Rasmussen College, Inc. The new name builds on the strength of the Company's largest institution, Rasmussen College, which operates five campuses in Minnesota along with fully online programs. Rasmussen College, Inc. also owns and operates Aakers College with two campuses in North Dakota and Webster College with two campuses in Florida. The Rasmussen College, Inc. institutions offer a diversified set of programs in Accounting, Allied Health, Business Management, Crime Management, Early Childhood Education, Digital Design and Advertising, Nursing, Office Management and Technology and Information Management.



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Embanet and Compass Knowledge Group Announce Merger to Create the Premier Provider of Online Learning Services for Higher Education

October 25, 2010 06:00 PM Eastern Daylight Time

CHICAGO & ORLANDO, Fla.--(BUSINESS WIRE)--In response to the rapidly growing and changing market for online degree programs, Embanet and Compass Knowledge Group today announced that they have merged, creating a combined company that is positioned to provide an industry-leading comprehensive suite of online learning services to universities and colleges. Effective today, the new entity is operating under the name [Embanet-Compass Knowledge Group](#).

"In the next five years, we expect nearly 4 million new online learners will come into this market"

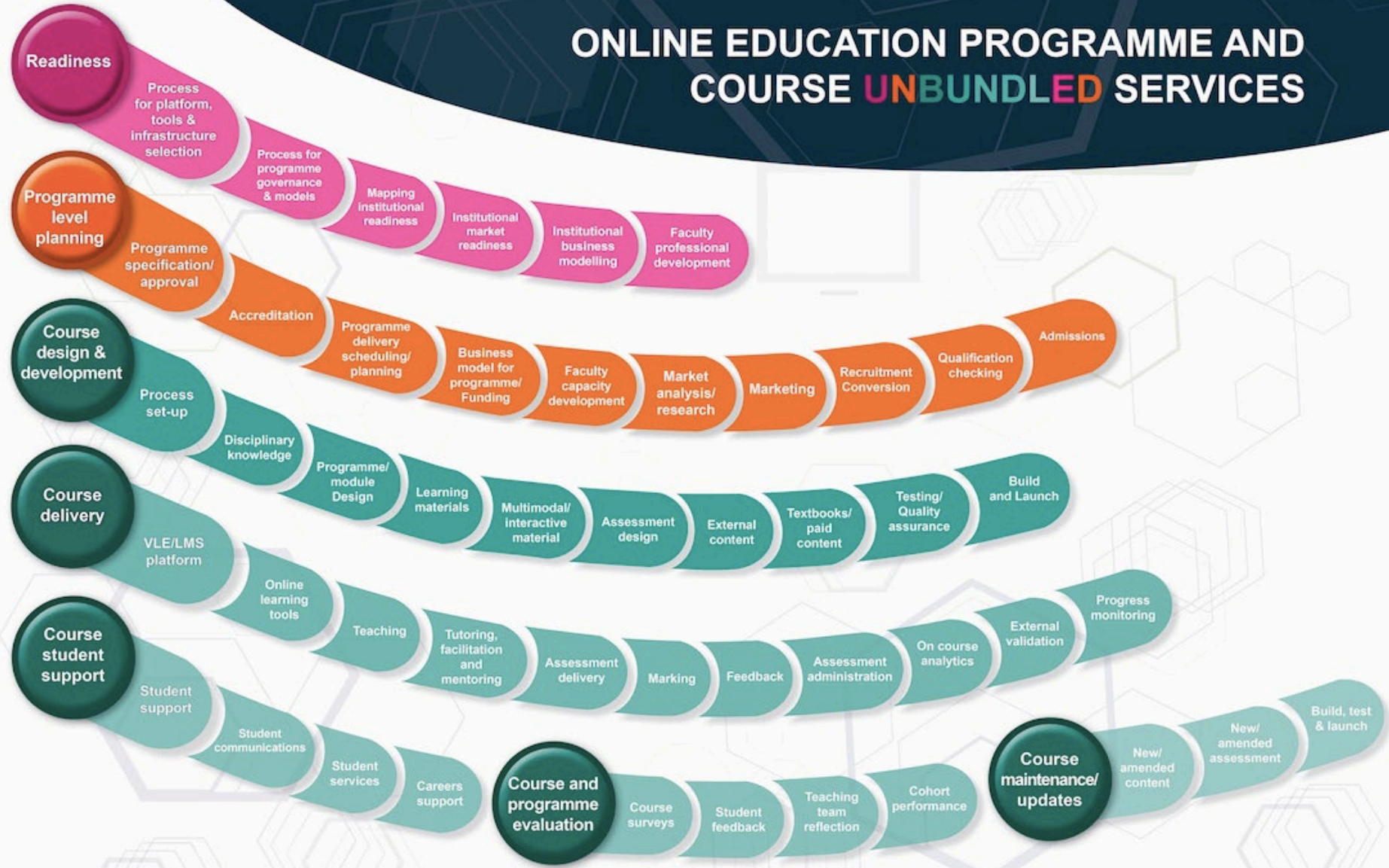
[Tweet this](#)

Embanet-Compass Knowledge Group brings together two of the leading organizations serving the not-for-profit online higher education market. Embanet and Compass share a common mission and service model to help colleges and universities ensure quality outcomes for students and expand their reach through online degree programs, both nationally and internationally. The combined strengths of these two organizations will create the stability and agility required to meet the growing global demand for online learning. The mission of Embanet-Compass is to assist traditional institutions in launching and managing large, successful online degree and certificate programs in a highly competitive environment.

Suggested Definitions

- Online Program Management (OPM): Service providers who act as the primary partner to enable a higher education institution to create and / or deliver an online program; typically offering full-service, bundled offering.
- Online Program Enablement (OPE): Service providers who act as the primary partner to enable a higher education institution to create and / or deliver an online **or hybrid** program; **typically offering a significant subset of services.**
- Courseware, LMS, General EdTech, Technology Development & Integration: While important, these **are not** the same as OPM or OPE.

ONLINE EDUCATION PROGRAMME AND COURSE UNBUNDLED SERVICES



COMMON FUNDING MODELS

The diagram below illustrates three common funding models for an institution to resource online education. Note that there is a continuum between these and various combinations may be possible.

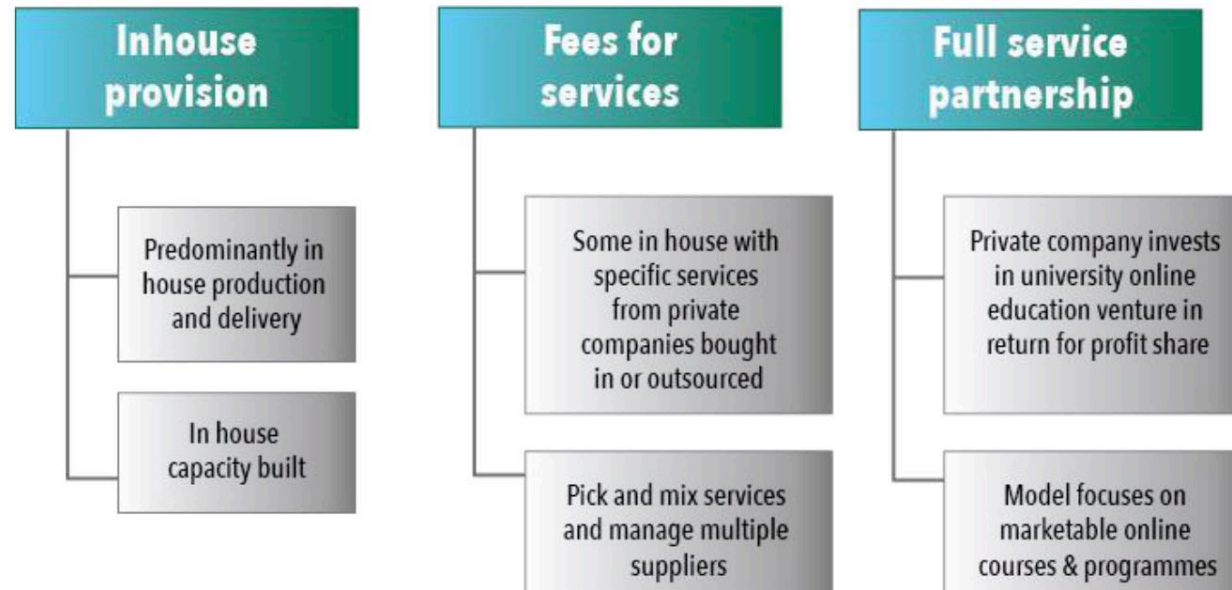


Figure 4: Common funding models for resourcing online education

Full Report: https://open.uct.ac.za/bitstream/handle/11427/29813/Czerniewicz_Walji2019.pdf

OPM MARKET DYNAMICS

FALL 2019 EDITION



Pushback Against OPMs / Rev Share

Spotlight swings to for-profit middlemen that may be driving up the cost of online higher education

THE CENTURY | 1919 FOUNDATION | 2019

PHM|EdTech

The Century Foundation on Online Education and OPMs: Position paper masquerading as a study

<https://bit.ly/wcehill19>

THE CREEPING CAPITALIST

CooleyED
Education policy, technology and business

Department Announces California Residents at Out-of-State Public and Nonprofit Institutions Ineligible for Federal Student Aid

MINDWIRE



Playing in the corner

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you want better clean air, we can offer you that

Clean Air

Clean Water

Congress EdPsChief

- Noodle Partners offers a form of revenue sharing.
- 2U now has model for fee-for-service.
- Several OPM companies offer both options.

<https://bit.ly/wcehill19>

MINDWIRE

Pushback Against OPMs / Rev Share

THE HECHINGER REPORT Covering Innovation & Inequality in Education TOPICS ABOUT DONATE

Higher Education  

Spotlight swings to for-profit middlemen that may be driving up the cost of online higher education

In hiring companies known as online program managers, universities give up what is often a large share of revenues

 THE CENTURY FOUNDATION | 1919 2019

Phil^{on}EdTech Home About the z



The Century Foundation on Online Education and OPMs: Position paper masquerading as a study



CooleyED

Education policy, technology and business

Higher Ed

Department Announces California Residents at Out-of-State Public and Nonprofit Institutions Ineligible for Federal Student Aid

Nancy Anderson, Mike Goldstein and Paul Thompson >

The Department of Education announced yesterday that California residents enrolled in distance education programs at out-of-state public and nonprofit institutions will be ineligible from receiving federal student aid.

posted on July 23, 2019

<https://bit.ly/wcethill19>



CartoonStock.com

- Noodle Partners offers a form of revenue sharing.
- 2U now has model for fee-for-service.
- Several OPM companies offer both options.





Photo Credit: www.mummymummymum.com

Playing in the corner

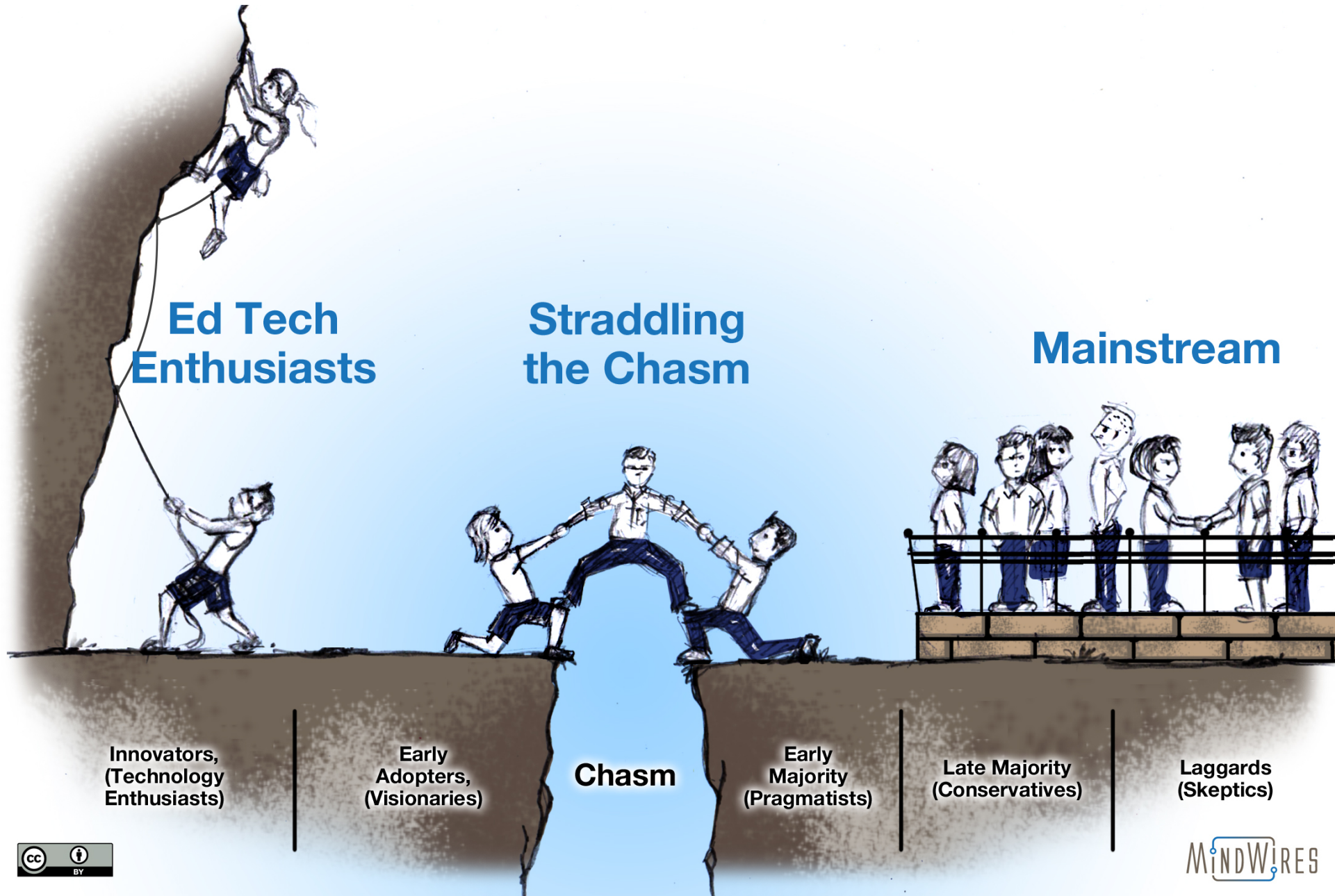


Photo Credit: <http://www.youtube.com/user/mtmuzic>

Now loose in the house

<https://bit.ly/wcethill19>

MINDWIRES



Key Trends

- Moving away from “Deans Gone Wild” toward a more coordinated institutional approach, even with different choices per program.
- Online market itself is crowded – competition for students.
- Increased focus on oversight, transparency through regulation.
- Increased focus on economics – for the student and for the institution.
- Increased focus on engaging course design.



Website: <https://mindwires.com/>

Twitter: <https://twitter.com/PhilOnEdTech>

Blog: <https://philonedtech.com/>



Questions from the Audience

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<http://wcet.wiche.edu/>

Join WCET: learn more about the benefits of joining our national community:

<http://wcet.wiche.edu/join-wcet>

Focus Areas ▼

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<https://wcet.wiche.edu/events/annual-meeting>





ADDITIONAL INFORMATION AND RESOURCES

Access to the resources discussed during this webcast, including the archive, will be available within 24 hours.

<http://wcet.wiche.edu/connect/webcasts>



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