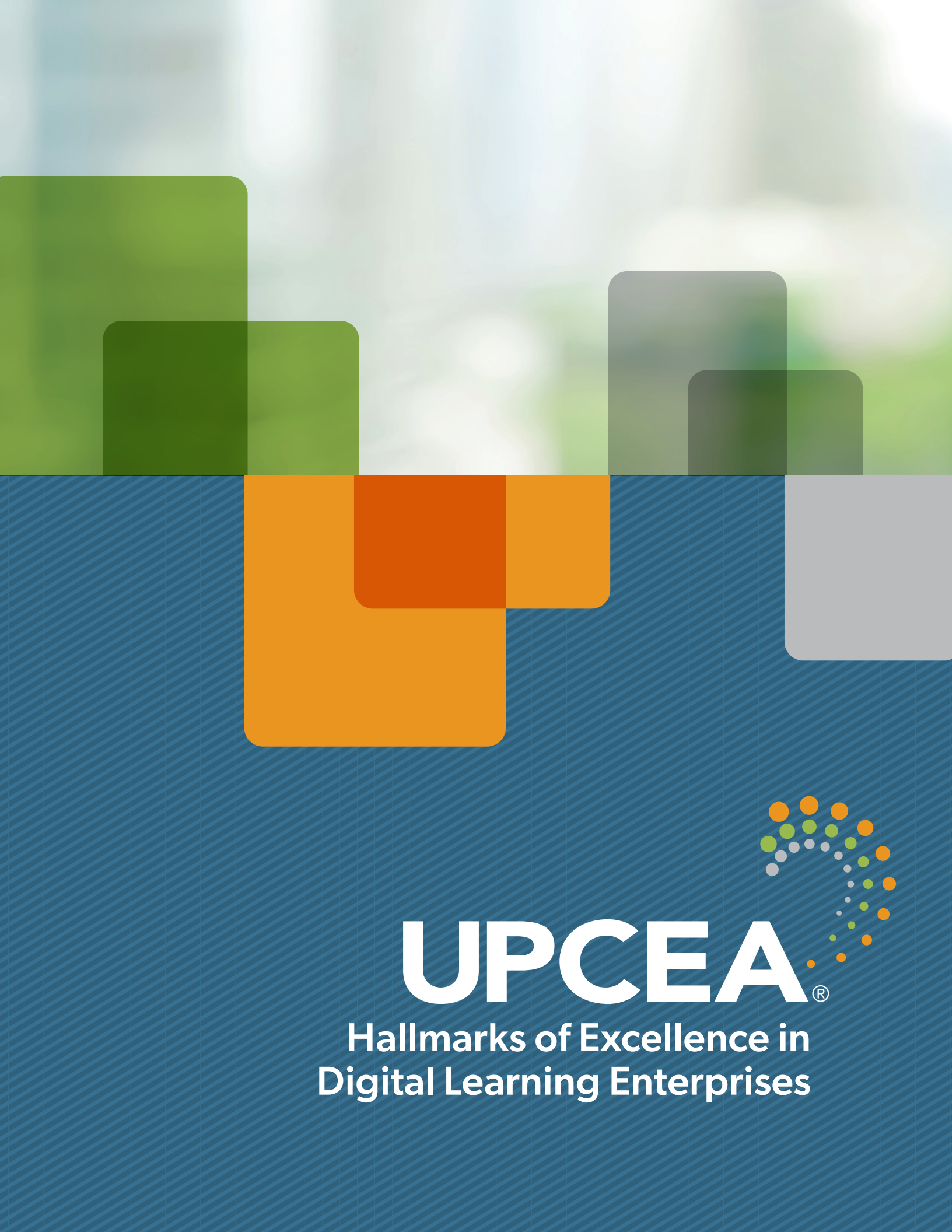

UPCEA®
Hallmarks of Excellence in
Digital Learning Enterprises

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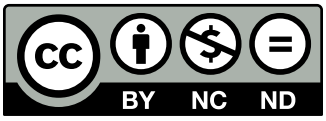
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Endorsing Organizations



















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Hallmark II: Entrepreneurial Initiatives

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Hallmark III: Instructional Support

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Hallmark VI: External Advocacy and Leadership Beyond the Institution

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Hallmark VII: Professionalism, Ethics, and Stewardship

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How The Hallmarks Have Changed

From Online Leadership to Digital Learning Enterprises

The 2016 *Hallmarks of Excellence in Online Leadership* emerged during a period when online learning was still establishing legitimacy within many colleges and universities. Institutions were focused on creating organizational structures, developing support systems, and building confidence in the quality and potential of online education.

A decade later, digital learning has become a central component of institutional strategy, operations, learner engagement, workforce development, and organizational resilience. The 2026 Hallmarks build on the foundation established in 2016 while reflecting the expanded scope, complexity, and strategic significance of digital learning enterprises.

2016	**2026**
Emerging online modality	Institutional digital infrastructure
Organizational models	Enterprise transformation
Building legitimacy	Cultural integration
Distributed experimentation	Coordinated leadership
Technology tools	Technology ecosystems
Access and flexibility	Workforce alignment and learner mobility

From Emerging Modality to Core Institutional Infrastructure

In 2016, online education was still transitioning from innovation to mainstream adoption. The 2026 Hallmarks recognize digital learning as foundational institutional infrastructure that supports learning, operations, compliance, and learner engagement across modalities. This reflects a shift from viewing online learning as a programmatic activity to viewing digital capability as an institutional necessity.

From Organizational Models to Enterprise Transformation

The 2016 Hallmarks emphasized organizational structures and leadership models that could support online learning. The 2026 framework expands this focus to enterprise transformation, recognizing that institutions must redesign policies, governance, workflows, and organizational practices to support digitally enabled learning environments. The rise of artificial intelligence, automation, and emerging digital capabilities further expands this challenge. Institutions must increasingly evaluate not only which technologies to adopt, but also how those technologies may reshape workflows, organizational structures, staffing models, and service delivery.

From Advocacy to Integration and Cultural Alignment

In 2016, a central challenge was legitimizing online education, building internal advocacy, and overcoming skepticism. In 2026, the emphasis shifts to full cultural integration. Digital learning leaders are no longer just advocates; they are responsible for embedding digital learning into institutional identity, aligning it with mission, and ensuring it is not treated as a separate or competing activity. The question is no longer whether online education belongs, but how effectively it is integrated.

From Distributed Experimentation to Coordinated Enterprise Leadership

While the 2016 framework reflected a variety of emerging organizational approaches, the 2026 Hallmarks recognize the need for coordinated enterprise leadership capable of aligning strategy, quality, compliance, operations, and innovation across the institution.

From Technology as Tool to Technology as Ecosystem

In 2016, digital technology was framed as an enabler, requiring reliability, creativity, and support. In 2026, technology has been reconceptualized as a strategic, learner-centered ecosystem, integrated across systems, supporting seamless learner experiences, enabling personalization, and incorporating emerging capabilities such as AI and advanced analytics. This marks a shift from managing tools to designing and governing complex digital environments.

From Access and Flexibility to Workforce Alignment and Learner Mobility

While the 2016 Hallmarks emphasized access, flexibility, and comparability to the on-campus experience, the 2026 framework expands the purpose of digital learning to include workforce alignment, social mobility, and lifelong learning pathways. Digital learning is now positioned as a primary mechanism for addressing demographic shifts, enrollment challenges, and evolving learner expectations.

The updated framework also recognizes that credentials increasingly exist within broader digital ecosystems. Learners, employers, and workforce platforms increasingly rely on digital records, credential verification, and machine-readable representations of learning. As a result, discoverability, portability, and trust have become important components of learner mobility.

Continuity with Evolution

Despite these shifts, the core structure of the Hallmarks remains intentionally consistent. The seven domains—advocacy, entrepreneurship, instructional/faculty support, learner support, technology, external engagement, and professionalism—persist across both versions.

However, their scope has expanded significantly:

- Faculty Support to Instructional Support (to encompass broader, team-based design and delivery models)
- Student Support to Learner Support (reflective of lifetime learning, holistic support, and personalized engagement)
- Entrepreneurial Initiatives now tied to revenue diversification, partnerships, and market responsiveness
- Professionalism and External Leadership now operate at a national and global ecosystem level.
- Advocacy and Leadership expanded from supporting online learning initiatives to guiding enterprise-wide digital transformation, institutional integration, and ecosystem engagement.

This continuity ensures that the 2026 Hallmarks build directly on the foundation established in 2016, while reflecting the scale and complexity of today's digital learning ecosystem. Institutions may express these Hallmarks differently based on mission, governance structures, scale, learner populations, resources, and strategic priorities.

In Summary

The evolution from 2016 to 2026 reflects a field that has moved:

- From emerging to essential
- From program to enterprise
- From support function to strategic driver
- From online education to fully integrated digital learning ecosystems
- From advocacy for legitimacy to institutional integration
- From technology adoption to organizational transformation

The 2026 Hallmarks extend and operationalize the 2016 Hallmarks for a new era in which digital learning is inseparable from institutional mission, learner success, workforce relevance, and long-term institutional sustainability.

Executive Summary

The *Hallmarks of Excellence in Digital Learning Enterprises* framework positions higher education at a critical inflection point: digital learning is no longer a peripheral or programmatic add-on but a central, mission-critical component of institutional strategy, operations, and long-term viability. Unlike frameworks that focus primarily on educational technology, course design, instructional quality, or faculty practice, the Hallmarks of Excellence in Digital Learning Enterprises address the leadership, governance, operational, financial, regulatory, technological, and strategic dimensions required to sustain digital learning as an institutional enterprise.

From Modality to Institutional Infrastructure

The document emphasizes a decisive shift away from viewing online education as a siloed initiative, often housed in continuing or professional education units, toward recognizing digital learning as core academic infrastructure. Institutions now operate simultaneously in physical and digital environments, and learners increasingly move fluidly between modalities.

This evolution reflects sustained demand for flexible, accessible education, driven by working professionals, adult learners, and increasingly, residential students who expect digitally integrated experiences. As a result, the traditional distinction between "online" and "on campus" education is becoming obsolete, replaced by a cohesive, multi-modal ecosystem that supports diverse learner journeys. While the Hallmarks articulate common principles of excellence, institutions vary significantly in mission, scale, governance structures, learner populations, organizational culture, and resource availability. Excellence may therefore be expressed differently across institutional contexts while remaining aligned with the underlying aspirations of the framework.

Institutional Transformation, Not Incremental Adoption

The framework makes clear that simply adapting existing residential models for online delivery is insufficient. Effective digital learning requires institutions to rethink program design, delivery models, and learner support systems based on market realities, workforce alignment, and the expectations of post-traditional learners.

Technology alone does not create effective digital learning enterprises. While most institutions possess robust technical infrastructure, success depends on reconfiguring policies, governance structures, resource models, workflows, and organizational practices to align with digitally enabled learning environments. Digital learning must be embedded into academic planning, enrollment strategy, workforce engagement, and institutional governance—not layered on top of legacy systems.

As institutions increasingly adopt artificial intelligence and other emerging technologies, leaders must also evaluate how these innovations may reshape staffing models, service delivery, operational workflows, and organizational design while preserving educational quality, institutional values, and learner success.

Centralized Leadership and the Role of the COLO

A central theme is the necessity of dedicated, empowered leadership to drive this transformation. The document highlights the importance of a Chief Online Learning Officer (COLO)[1] or equivalent role with institution-wide authority over strategy, quality, compliance, and coordination.

This leadership model reflects a shift from distributed experimentation to coordinated execution. Digital learning sits at the intersection of academic affairs, enrollment management, technology, and finance, requiring cross-functional alignment that cannot be achieved through decentralized efforts alone. Effective leaders act as strategic integrators, translating market intelligence into academic offerings, aligning stakeholders, and ensuring institutional coherence.

Internal Advocacy and Cultural Integration

The document frames internal advocacy as a core leadership responsibility. Digital learning leaders must reposition online education as an essential expression of institutional mission rather than a competing or supplemental activity.

This involves:

- Building coalitions across academic and administrative units
- Embedding digital learning into strategic planning and accreditation processes
- Aligning messaging to articulate learner and institutional value
- Establishing shared definitions, data standards, and performance metrics
- Aligning incentives, accountability structures, and resource models to support cross-functional collaboration and shared ownership of learner success

Critically, this advocacy is not about replacing traditional models, but about integrating and elevating them—ensuring that innovation strengthens, rather than fragments, the institution.

Portfolio Strategy, Market Alignment, and Differentiation

The Hallmarks underscore the need for intentional portfolio management informed by market demand, competitive positioning, and workforce needs. Institutions must move beyond opportunistic program launches toward disciplined portfolio strategies that evaluate program viability, scalability, and differentiation.

Employer engagement, credential innovation (including stackable and non-degree offerings), interoperable learning records, and data-informed decision-making are essential mechanisms for ensuring relevance, transparency, and value. As learners increasingly move among educational providers, employers, and workforce platforms, institutions must ensure that credentials and evidence of learning are discoverable, portable, and trusted. This reflects a broader shift toward lifelong learning ecosystems that extend beyond traditional degree pathways.

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1 While these hallmarks focus on digital learning enterprises, the term chief online learning officer (COLO) is used intentionally and inclusively. In 2023, the definition of the COLO role was broadened to encompass the primary leader "for an online, digital, or other technology-enhanced postsecondary enterprise" (Uranis, 2023), reflecting the evolution of online learning units into more comprehensive digital learning enterprises. The continued use of the COLO designation acknowledges both the historical foundations of the role and its contemporary scope across online, digital, and technology-enabled education initiatives. Accordingly, references to the COLO throughout these hallmarks should be understood as inclusive of leaders responsible for digital learning enterprises in their varied institutional forms.

Operational Integration and Capacity Building

Achieving scale in digital learning requires coordinated investment across the full institutional ecosystem, including:

- Instructional design and faculty development
- Enrollment management and marketing
- Technology infrastructure and analytics
- Student support services and advice

The document stresses that quality and consistency depend on integrated systems, shared standards, and continuous assessment. Digital learning exposes institutional gaps, whether in accessibility, student support, or policy alignment, making it both a catalyst and a test of organizational effectiveness.

Financial Sustainability and Risk Management

Digital learning is positioned as both a growth strategy and a financial imperative. Institutions are encouraged to develop sustainable business models that balance program development costs, market demand, and long-term return on investment.

This includes exploring diversified revenue streams, adjusting pricing models with learner expectations, aligning fees to actual use (e.g., athletic fees, facilities fees), and conducting scenario planning to ensure resilience under changing market conditions. The risks of inaction are explicitly noted: institutions that fail to integrate digital learning into core strategy may face declining enrollment, reduced competitiveness, and reputational erosion.

Learner Value as the Unifying Principle

Underlying all seven Hallmarks is a commitment to creating meaningful value for learners. Digital learning enterprises must continually balance access, affordability, flexibility, quality, workforce relevance, and learner outcomes in ways that justify the investment learners make in higher education and strengthen public confidence in institutional effectiveness.

Toward a Multi-Modal Learning Ecosystem

Ultimately, the Hallmarks call for a redefinition of the learning enterprise. Digital learning is not a distinct modality but a foundational capability that enhances access, flexibility, and institutional impact across all programs.

Institutions that succeed will:

- Embed digital learning into their mission and strategy
- Build centralized leadership with cross-functional authority
- Design integrated, learner-centered ecosystems
- Align academic offerings with workforce and market needs
- Foster a culture of collaboration, innovation, and continuous improvement

In this model, digital learning becomes a unifying force—connecting learners to the full intellectual life of the institution while enabling universities to adapt to shifting demographics, technologies, and expectations.

A Foundation for Innovation

While innovation remains an essential component of effective digital learning enterprises, these Hallmarks are not intended to function as a catalogue of emerging practices or experimental initiatives. Rather, they establish the foundational capacities, structures, and commitments that institutions must sustain regardless of technological change or market conditions. Innovation has an important role within and across these domains, but innovation by definition requires exploration, piloting, assessment, and refinement before broad institutional adoption.

Emerging technologies and practices—including artificial intelligence, digital credentials, automation, and future innovations not yet imagined—will continue to evolve rapidly. The Hallmarks focus instead on the enduring institutional capacities necessary to evaluate, govern, implement, and scale such innovations responsibly.

The Hallmarks represent the enduring institutional capabilities upon which meaningful innovation can responsibly emerge and scale. In this way, the framework distinguishes between experimentation and institutional readiness: innovation may evolve rapidly, but the Hallmarks define the stable foundation necessary to evaluate, support, and operationalize new approaches in service of learner success and institutional resilience.

Intended Use of the Hallmarks and Organization of the Document

This document is intended to serve both as a structural framework and as a practical reference guide for institutions, leaders, and practitioners. The Hallmarks are intended for presidents, provosts, chief online learning officers, continuing and professional education leaders, instructional design leaders, student affairs professionals, faculty governance leaders, academic administrators, and other stakeholders responsible for advancing digital learning strategy and operations. Because institutions differ significantly in mission, structure, maturity, and strategic priorities, the Hallmarks are intended to be adapted to local contexts rather than applied as a prescriptive checklist.

While the Hallmarks are designed to collectively present an integrated vision for advancing practice, strategy, and innovation in professional, continuing, and online education, each hallmark may also be read and applied independently. Because the hallmarks are interconnected and often address overlapping institutional priorities, certain concepts, themes, and practices intentionally recur throughout the document within the specific context of each hallmark. This repetition reflects the integrated nature of contemporary higher education leadership and operations rather than redundancy. To support standalone use, each hallmark includes its own citations and corresponding reference list, enabling readers to engage with individual sections independently while maintaining access to the relevant scholarly, policy, and practice-based sources informing that hallmark.

Hallmark 1: Internal Advocacy and Leadership Within the Institution

Hallmark Overview

Digital learning enterprises require intentional leadership, governance, and institutional alignment to move beyond isolated initiatives and become integrated components of institutional strategy and operations. This hallmark focuses on the leadership structures, partnerships, and organizational conditions necessary to support sustainable digital transformation, institutional resilience, and learner success.

Major Themes

- Enterprise leadership and governance
- Strategic planning and institutional alignment
- Organizational transformation and change leadership
- Collaboration and stakeholder engagement
- Sustainability and resource stewardship
- Data-informed decision-making
- Institutional culture and integration

Connections to Other Hallmarks

This hallmark establishes the institutional foundation that enables instructional quality (Hallmark 3), learner success (Hallmark 4), technology governance (Hallmark 5), external engagement (Hallmark 6), and continuous improvement (Hallmark 7). Without strong leadership and institutional alignment, progress in the other hallmarks is difficult to sustain.

Most Relevant To

Presidents, provosts, chief online learning officers, continuing and professional education leaders, enrollment management leaders, strategic planning offices, institutional effectiveness professionals, academic administrators, and governing boards.

Readers interested in this hallmark may also wish to review: Hallmarks 2, 5, and 6.

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Hallmark Context

Online leadership today is about re-visioning the university to meet the rapidly changing environments of the second quarter of the 21st century. We are (1) leaders in helping our institutions adapt a cohesive and adapting digital architecture comparable in quality to that traditionally built on a physical architecture, (2) advocates for the new majority of learners who are looking to incorporate learning into their lives, not give up their lives for learning, and (3) interpreters for the vision of higher education which is increasingly defined by others--policy makers, legislators, technologies, and students themselves. Our strategies must be responsive to these visions, not imposing a vision on them.

Without champions to maintain focus on multiple stakeholders and competing interests, disparate systems can become even more disjointed, unstable, and siloed. As leaders seek to maximize the use of existing technology stacks, strategies and tactics must be developed to ensure that the use of digital learning technologies are purposeful, effective, sustainable, and well understood by internal and external stakeholders.

Digital learning succeeds when it is treated as institutional infrastructure, not a separate initiative.

Regardless of the organizational reporting lines and portfolios of online and digital learning enterprises, leaders of these units often find themselves in a strategic advisor role at their institution. Although many online and digital learning enterprises were incubated in professional and continuing education entities, we now find digital learning enterprises in a variety of institutional contexts and levels of autonomy: wholly separate units, nested within a senior leader's portfolio, as a service entity akin to IT or the library, or nested within an academic college (Uranis, J., Ives, K., Etter, B., Sullberg, D., 2025). No matter where online and digital learning resides, it remains part of an institution's broader strategy in fact, the focus on digital learning modalities has only sharpened over time. This often creates tensions as leaders with competing interests and motivations may disrupt the mission, administration, and execution of these enterprises. A leader must remain focused on an enterprise-wide vision.

Colleges and universities face growing pressure to demonstrate value while responding to demographic change, financial constraints, and technological disruption. Leaders must remain committed to financial stewardship and transparency. Not only are prospective students questioning cost and time to degrees, parents, as well as other stakeholders including employers, are also questioning higher education's value in today's society.

The primary intent of this hallmark is to detail the elements necessary to position multimodal learning as a core expression of the institution's mission and strategy and as a foundation for a broader lifelong learning ecosystem that serves learners across multiple stages of education and career. Digital learning surpasses a single modality. Students today may move between program modalities while they seek educational experiences that are combinations of online and on-ground experiences. Critical to this effort are durable coalitions across the institution.

Effective governance requires sustained coordination among academic affairs, admissions, registrar functions, financial aid, legal counsel, information technology, institutional research, accessibility services, compliance personnel, academic departments, and student support offices. Likewise. institutions should establish clearly documented cross-functional processes for regulatory monitoring, professional licensure determinations, student disclosures, complaint management, state authorization activities, and curriculum change review (C-RAC, 2011; NCHEMS, 2021).[2]

2 Council of Regional Accrediting Commissions (C-RAC), Interregional Guidelines for the Evaluation of Distance Education (2011), Guidelines 2, 3, and 7; National Council for State Authorization Reciprocity Agreements (NC-SARA) and National Center for Higher Education Management Systems (NCHEMS), Proposed 21st Century Distance Education Guidelines (2021), Elements 7, 8, 14–17, and 23.

Per the CHLOE 10 Report, chief online learning officers are key partners in important areas: stewards of institutional strategy, digital trust, and leaner experiences, as well as quality governance for learning analytics, AI tools, and student data that balances innovation with privacy and transparency. (Simunich et al., 2025). Effective internal advocacy integrates digital learning into institutional planning, centers learner success, and aligns digital initiatives with institutional resilience, data governance, and AI strategy.

Key Elements of Internal Advocacy

- **Embed online strategy into institutional mission and learner success.** Engage all stakeholders to articulate a vision of online and multimodal learning that advances the institution's mission, goals, and learner success metrics (retention, completion, career outcomes), as well as differentiation of the university in today's competitive environment (Kahu, 2013; Tinto, 2016).
- **Integrate data, analytics, and definitions into institutional policies.** Work with institutional research, IT, and legal counsel to establish standards and definitions.
- **Use integrated marketing and messaging communications.** Both internal and external communications should articulate the opportunities, benefits, and successes of learners engaged in digital learning to develop trust and to demonstrate public value. Investing in the success of our students also invests in our institutional missions.
- **Accountability.** The chief online learning officer should be the named accountable party for institution-wide digital learning enterprise compliance and performance, reporting directly at a higher level of administration to President, Provost, or another cabinet level position. The COLO is responsible for institutional integrity in digital learning both in the current operations and strategy, as well as in future positioning of the institutional digital learning enterprise.
- **Coalition building.** Internal advocacy for online learning increasingly involves institution-wide coalition building across academic affairs, enrollment management, schools/colleges, IT, finance, as well as the ability to position as a part of institutional strategy rather than a separate initiative.

Why? Digital Transformation

Universities now exist in two worlds, digital and physical, and students move between these settings to achieve success in their learning journeys. The 2023, 2024, and 2025 CHLOE reports detail findings focused on institutional strategic shifts toward online and hybrid modalities (Garrett et al., 2023; Simunich et al., 2024; Simunich et al., 2025). Learners expect institutions to create a nexus of digital and physical experiences where elements of each symbiotically enrich the other. Digital transformation requires attention to enrollment sustainability, workforce relevance, operational effectiveness, and learner success. Digital learning is an important diversifying element in higher education program portfolios.

Institutional readiness and change management are required to support digital learning at scale. Successfully scaling online education is rarely a matter of simply adopting new technologies. Institutions primarily have extensive technology infrastructures—learning management systems, student information systems, analytics tools—but the processes and assumptions surrounding their use must be framed for all learners. Institutions should periodically evaluate how emerging technologies, including AI agents and autonomous systems, may alter organizational structures, staffing models, workflows, and service delivery. Digital learning leaders should ensure that technology strategies consider not only the adoption of new tools but also the redesign of institutional processes and human roles required to achieve sustainable effectiveness.

Effective digital learning requires more than technology investments. Institutional leaders should review policies, processes, and student services to ensure they support the needs and expectations of online and multi-modal learners. Research on digital transformation in higher education consistently notes that technological readiness alone does not guarantee effective adoption; institutions must also adapt organizational practices, teaching models, professional development, and student support systems to realize the benefits of online learning (Wang et al., 2025).

Holistic Learning Ecosystems and Learner Expectations

Digital learning provides access and scheduling flexibility as learners move between physical and digital experiences throughout their lives. Student demographics are evolving and online learners represent a fundamentally different subpopulation than the traditional residential student, characterized by multi-modal lifestyles, demands for instant connectivity, and constraints around time, money, and long-term commitments. The flexible modality of online learning, combined with elimination of geographical barriers, makes digital learning increasingly attractive in the higher education landscape and enables higher education to reach a larger population.

> Universities now operate in both physical and digital environments. Excellence depends on how effectively those worlds are integrated.

Online and digital learning modalities are uniquely positioned to serve these learners, but only when institutional policies, support structures, advising models, and transparent financial aid frameworks are deliberately designed with them in mind, rather than adopted and/or adapted from systems built for a different population. Digital transformation, in this context, is about the institutional will to restructure the educational experience around the needs of the learners who will sustain the institution's mission in the decades ahead. However, the requirements necessary to successfully implement a campus-wide effort are broader than simply acquiring technology tools and making them readily available. The institution must assess and modify policies, practices, and resource strategies for the successful effort to be fully realized.

Workforce needs increasingly influence how institutions design programs, credentials, and learning pathways. Effective workforce alignment requires that postsecondary leaders establish and maintain active employer engagement structures: advisory boards with defined roles and renewal cycles, formal partnerships with regional and national employers for credential validation and internship pipelines, and participation in sector-based workforce coalitions. These relationships should inform what programs are offered and how they are structured.

Institutions that successfully align their digital learning portfolio with workforce realities strengthen their value proposition at every level: for individual learners seeking return on their educational investment, for employers seeking talent pipelines they can trust, and for policymakers and accreditors seeking evidence that public and student investments in higher education produce measurable outcomes.

What? Institutional Commitment

An institution-wide commitment to digital education as a key strategy requires all pieces of the puzzle to fit together. Regardless of how discrete its administrative entity is, online education—by its very nature—operates in close coordination and cooperation with the institution as a whole.

Rapidly evolving technologies, changes in learner demographics and competitive environment, accreditor expectations, and economic factors necessitate a comprehensive, mission-driven plan that shifts when needed. Technology adoption, such as embracing artificial intelligence (AI) is not linear in nature, but curved. Institutions must remain agile in evaluating emerging technologies while ensuring that adoption processes include appropriate governance, accessibility review, security assessment, procurement controls, and regulatory risk evaluation. Therefore, institutions—which have historically been viewed as generators of new knowledge—will have to create processes and safety strategies for themselves during the constancy of the change. The elements involved in developing this plan require leadership, determination, and a willingness to participate. Essential to the change management attributes most often associated with strategic initiatives, leadership must also educate stakeholders and advocate for online and digital education.

An institution-wide commitment to keeping institutional practices up to date and in compliance with various regulatory bodies is critical in the rapidly changing landscape of higher education. The chief online learning officer plays a central leadership role in ensuring that the institution's digital learning enterprise operates with integrity, accountability, and regulatory alignment across an increasingly complex compliance environment. Online and multi-modal learning are subject to a wide range of regulatory, accreditation, and consumer protection requirements. These include federal financial aid regulations, state authorization requirements, accessibility obligations, professional licensure disclosures, data privacy requirements, and oversight of third-party partnerships. The COLO should coordinate institutional efforts across these areas and help ensure that digital learning governance remains aligned with institutional strategy, compliance obligations, and learner needs. In collaboration with academic affairs, legal counsel, financial aid, enrollment management, information technology, institutional research, accessibility services, and other institutional leaders, the COLO should help establish formal governance structures that support continuous regulatory monitoring, risk assessment, audit readiness, documentation practices, vendor accountability, and transparent learner-facing policies.

Effective compliance governance is not separate from institutional strategy; it is foundational to sustaining public trust, protecting students, preserving institutional eligibility and reputation, and enabling responsible innovation at scale. Institutions should recognize state authorization and professional licensure compliance as components of institutional enterprise risk management. Regulatory noncompliance may affect Title IV eligibility, institutional state authorization status, reputational standing, student progression into licensed professions, and institutional access to multi-state educational markets. Oversight of digital learning compliance should therefore be integrated into senior leadership, institutional governance, and institutional risk-management structures (Kerensky & Cheverton, 2026; Carroll, et al., 2023).

The risk of inaction is real. Institutions that fail to embed online and digital learning into their core strategy risk program closures, reputational erosion, and an inability to compete for learners who have more choices than at any previous point in higher education history.

Who and How? Leadership and Vision Alignment

Vision

Establishing a meaningful vision for online and digital learning requires experienced leaders and expertise in online learning. Leaders responsible for online strategy must understand emerging market opportunities, learner segments, competitive program landscapes, regulatory compliance, and the full continuum of digital offerings—from certificates and stackable credentials to fully online degrees.

Developing a campus-wide strategy requires more than consultative processes. It requires leaders who can translate market intelligence into academic strategy, identify areas of institutional strength that will scale effectively online, and influence direction across colleges and administrative units. Advisory structures help build shared understanding and faculty engagement but are most effective when they complement clear strategic leadership and accountability for the online learning portfolio. Leaders must be able to see an institution-wide vision while building daily operational competencies among their digital learning teams.

Leadership

Vision, particularly for online and digital learning, cannot be fully implemented without a leader charged with both the strategic direction and tactics necessary to realize the vision for online learning at the institution. Institutional leaders must formalize the role of a Chief Online Learning Officer or equivalent within senior academic or institutional leadership, with clear authority over strategy, quality, compliance and resource prioritization across colleges (Widmer & Cavanagh, 2025; Fredrickson, E., Simunich, B, Uranis, J., 2025, Uranis, 2023, Herron et al., 2016).

The chief online learning officer, or equivalent administrative leader, should be the named accountable party for institution-wide digital learning enterprise compliance and performance, reporting directly at a higher level of administration to President, Provost, or another cabinet level position. Institutional leaders overseeing digital learning enterprises must ensure alignment with state authorization requirements, reciprocity agreements, professional licensure disclosure obligations, and student location compliance processes. Institutions should maintain centralized governance structures capable of monitoring regulatory changes across jurisdictions and coordinating disclosures, approvals, and reporting obligations. Further, centralized governance structures should address the stewardship, exchange, verification, privacy, portability, and lifecycle management of digital credentials and learner records across institutional and external systems, consistent with emerging interoperability frameworks for Comprehensive Learner Records, Open Badges, and Learning and Employment Records (1EdTech Consortium, 2026a; 1EdTech Consortium, 2026b).[3]

The COLO should have *formal authority* over quality standards, technology platform governance, instructional design standards, and cross-institutional coordination. They should exercise *influence* over teaching excellence, college-level program decisions, and resource allocation within academic units. In essence, the COLO is responsible for institutional integrity in digital learning both in the current operations and strategy, as well as in future positioning of the institutional digital learning enterprise.

Institutions should establish staffing and operational models sufficient to support the growing complexity of digital learning compliance obligations. Compliance responsibilities should not rely exclusively on a single individual or informal institutional knowledge. Institutions should implement succession planning, cross-training, documented workflows, and continuity procedures to reduce institutional vulnerability associated with personnel transitions or distributed compliance ownership (Kerensky & Cheverton, 2026; Carroll, et al., 2023).

3 Digital credential ecosystems increasingly rely on interoperable standards that support credential issuance, exchange, verification, learner control, privacy protection, and long-term portability across educational and workforce systems. See 1EdTech Consortium's work on Competencies & Academic Standards, Comprehensive Learner Records (CLR), and Open Badges, which emphasizes trusted, standards-based approaches to managing digital credentials throughout their lifecycle.

Annual performance reviews for the COLO, as well as any online enterprise leaders, should include measurable targets for institutional digital learning enrollment health, learner success, accessibility, learner outcomes, quality assurance, completion rates, financial health, regulation compliance, faculty development and participation, and continuous improvement in the digital learning enterprise. Further, the management structure and resources for effective practices and internal and external analytics should:

- **Design the digital learning administrative organization.** Define the unit(s) as a critical part of the institution and recognize the unit(s) as the campus source for effective practices.
- **Define digital learning office(s) or unit(s).** This unit will serve as the lead for online and digital learning at the institutional level; if the institution is largely decentralized, consider designating an office or unit in each college or school, understanding coordination and collaboration across the institution is vital.
- **Designate a single leader.** An institution's COLO should lead the online enterprise(s) and champion quality online & digital education at the institution, regardless of the centralized or decentralized execution of digital leaning. Ensure leaders are empowered and resourced to establish plans and protocols for the initiative.
- **Document digital learning processes.** Digital learning enterprises should maintain documentation and audit-ready evidence regarding instructional engagement, accessibility reviews, faculty preparation, vendor oversight, disclosures, and student support practices.
- **Devote resources to compliance.** Institutions should maintain reliable systems and institutional processes for tracking student location, program modality, licensure pathway applicability, and related regulatory obligations. Data governance structures should support timely disclosures, institutional reporting, state authorization obligations, and compliance monitoring across all instructional modalities (Kerensky & Cheverton, 2026).

Strategy

Institutional leadership must establish an overarching leadership framework, inclusive of strategies and standards based on institutional factors which inform and influence digital learning and portfolio strategy. Regardless of modality, institutional leaders should have guidelines for program life cycles, market demand, financial viability, scalability, competitive differentiation, data analytics, intentional program design, shared governance (decision rights and responsibilities), assessment, and overall strategic planning and accountability. Institutional frameworks and guidelines should include:

- **Long-range goals.** Institutional and online education goals should be informed by an analysis of existing academic strengths, infrastructure, programs, resources, and areas that need enhancement and development. Regular scenario planning exercises should model alternative futures and include optimistic, baseline, and resource-constrained scenarios across a planning horizon that is sufficiently long to support strategic decision-making while remaining responsive to changing conditions (typically three to five years).
- **Online portfolio and institutional digital integration strategies.** Establish both a program portfolio management strategy and an institution-level digital integration strategy. Digital integration strategy should guide decisions about the overall online portfolio, which should consider program health, market demand, institutional differentiation, and long-term sustainability. All learners should have access to an experience that provides high-quality digital learning as an embedded feature of multi-modal education, not only within fully online programs.

- **Academic governance structure.** Governance, especially one that relies on existing structures, provides academic credibility and guidance. Leaders should formalize the relationship between the online learning enterprise and faculty governance structures or other academic decision-making processes through a standing resolution or agreement that articulates shared governance principles for online program approval, quality review, and faculty support obligations.
- **Develop campus-relevant terminology and definitions** for online and digital education courses, programs, and learners to ensure that definitions are aligned with accreditor expectations, federal reporting requirements, and state authorization obligations. Review and reaffirm definitions on a regular cycle as delivery modalities evolve.
- **Incorporate definitions within information systems** to ensure data integrity regarding how digital learning courses are differentiated and coded, programs identified, and student status determined. Ensure that data infrastructure supports internal reporting and external benchmarking to demonstrate ROI and subsequent faculty workloads.
- **Disseminate and promote the digital learning strategy** throughout campus for transparency and accountability. Include all administrative levels, faculty senate, and student organizations.
- **Document digital learning processes** to include regulatory calendars, institutional decision trees, disclosure workflows, escalation procedures, approval pathways, role assignments, and audit-ready records related to state authorization, professional licensure determinations, accessibility obligations, and distance education compliance requirements (Kerensky & Cheverton, 2026; Carroll, et al., 2023).

> Sustainable digital transformation requires more than technology—it requires institutions to rethink policies, processes, and services around learner needs.

- **Identify and publicize wins.** Use internal and external communication plans to promote and advocate for digital learning.

Engagement

Online learning has become a primary growth strategy for many institutions, serving as both a revenue source and a means of enhancing institutional reputation and competitiveness (Bichsel, 2013). As institutions respond to increasing demand for flexible learning and pursue broader digital transformation and resilience, online and hybrid models are increasingly embedded into long-term strategic planning (Muscanell, 2024). Universities are leveraging online programs to expand enrollment and generate new revenue streams at scale. In this context, centralized leadership is essential to align technology, pedagogy, and enrollment strategy and to build institutional capacity for sustained growth. While the COLO advocates and supports the vision for online and digital learning broadly across the institution, leaders must engage stakeholders. All internal constituencies must understand the vision for digital learning, one that is consistent with the institution's mission, goals, strengths, and strategy:

- **Rely on advisors.** Establish an advisory group which collaborates with and advises the COLO on a digital learning vision representative of all stakeholders. This group should include individuals or units (academic and administrative) with experience and knowledge of digital learning and may be composed of both internal and external partners. Charge the group to align the vision for online and digital education with the mission of the institution

- **Faculty involvement.** Build sustained partnerships with faculty through transparent governance processes, meaningful faculty development opportunities, and recognition of excellence in digital and multi-modal teaching. Faculty partnership is essential to scaling innovation while preserving the academic values and instructional quality that define the institution.
- **Academic unit collaboration.** Regularly determine instructional capacity, resource needs, and academic strengths and priorities. Identify targets of opportunity that might be key to launching or extending online and digital education within the institution. Using marketing research data, distinguish between programs with strong growth potential, those requiring stabilization, and those that may warrant consolidation or discontinuation based on data.

Establish metrics that provide measurements of success:

- **Set transparent metrics** based on capacity, growth and access goals, and internal and external expectations. Metrics should include disaggregated learner outcomes to ensure that equity in outcomes is a measurable institutional commitment and a demonstrable response to accreditor and public accountability expectations. Metrics related to financial outcomes should be established and annual goals identified.
- **Align metrics with external value demonstration.** Establish metrics that speak directly to internal stakeholders. Include cost-per-completion by modality, time-to-degree, employer satisfaction rates for program graduates, and the percentage of online programs holding current third-party quality review certification (Blankstein & Wolff-Eisenberg, 2020).
- **Conduct regular stress tests and strive for financial sustainability.** Test revenue and enrollment projections against adverse scenarios to ensure that the strategy remains viable under pressure and that contingency plans are developed before they are needed.

Sustainability

Scaling digital education requires considering the full cost-benefit equation—balancing program/portfolio development and delivery costs with revenue potential, market demand, and long-term institutional impact. Portfolio growth includes evaluating program profitability over time, developing marketing and recruitment infrastructure, and understanding the competitive landscape before investing in expansion.

Sustainable digital learning enterprises require not only scalable operational and financial models, but also mature compliance infrastructures capable of managing regulatory, legal, reputational, and audit-related risk across institutional, state, federal, and international contexts.

Partner with financial management staff to develop a sustainable resource strategy which includes:

- **Viable funding model.** The online enterprise's funding model will reflect the institution's philosophical perspective for online and digital learning:
    - » Direct costs to learners: Tuition differential or fees for those enrolled in online courses and programs. As modalities become more mixed and technologies are inherent in teaching and learning, this becomes an exercise in determining how much technology merits a fee or additional tuition to offset costs. Consider how any additional tuition and fees compare to existing rates for other populations of learners.
    - » Indirect costs to learners: Where the online enterprise(s) receive funding from a general source, similar to how centralized offices may be funded (e.g., the registrar, bursar, etc.)

- **Fund infrastructure.** Dedicate a portion of the revenue stream for learner acquisition, program development, statutory regulations, curriculum revisions, technology infrastructure, and faculty development.
- **Fund the future.** Create investment and innovation funds to grow and enhance program offerings. Consider revenue sharing models that will sustain programs and other institutional offices that lend toward learner acquisition, retention, and success.
- **Realistic revenue and expense forecasts.** Consider revenue targets that align with institutional practices pertaining to class sizes. How many students will be together in any given course section? How many course sections will be offered? How will faculty guidance and interaction be conducted in larger courses, and how many faculty will be required to teach the anticipated or acceptable numbers of students in these courses?
- **Cost of technology.** Financial sustainability planning should include total cost of ownership models for major technology platforms (LMS, proctoring, accessibility tools, AI tutoring systems), and revenue projections.

Communication

Develop an institution-wide value narrative that aligns internal stakeholders around the role of digital learning in advancing mission and learner success. The value, ideally, should be learner-centered, whereby all internal constituencies understand the benefits for all learners, specifically:

- **Accessibility.** Courses can be accessed by all learners, including those with disabilities and those with needs for self-pacing.
- **Literacy.** Exposure to both academic and non-academic platforms that may be used in digital learning experiences can create literacy and fluency with technology.
- **Learner cost savings.** Learners can avoid transportation costs or costly campus-adjacent housing costs.
- **Flexibility and convenience.** Learners who enroll in online and digital courses and programs can enhance their employment and other extracurricular opportunities—such as internships or study abroad experiences—and not lose time in obtaining a degree.
- **Learner diversification.** Allowing both campus-based and distant learners to enroll in online courses broadens opportunities for peer-to-peer learning and strengthens the overall learner experience for all constituencies. Likewise, it facilitates networking opportunities as career changers, and those new to the field have opportunities to engage with more experienced learners enrolled for career mobility.

A comprehensive communication effort requires a communication plan—both internal and external and updated annually. This allows institutional leaders to manage both internal and external spheres of influence across a full range of stakeholders.

Developing a distinct and succinct value proposition that can be incorporated into all internal and external communications is key. While emphasizing learner benefits, articulate institutional value to include opening access to new learner segments, addressing specific workforce needs, and responding to demographic shifts. Advocate for digital learning and learner success through flexibility, reskilling, career readiness in a rapidly changing workforce, and pathways to achieve learner goals.

Tactics found in such a communication plan often include:

- Websites. Use a website (may require both an internal and an external site) and institutional communications to share updates, events, recognitions and new or changed policies and procedures.
- Indirect and integrated messaging. Consider other indirect communication avenues such as faculty development workshops, online and digital teaching awards, and establishment of best practice examples.

Assessment and evaluation

Drive commitment to a comprehensive evaluation strategy:

- Use data metrics to determine contribution to institutional growth and diversification, meeting institutional enrollment goals, learner persistence and retention, program health metrics and learner and faculty satisfaction. Use data to drive an institutional performance and strategy framework.
- Integrate academic advising, success coaching, and learner analytics systems to provide coordinated support for online and multi-modal learners, ensuring that early alerts, outreach, and intervention strategies are aligned across academic and student affairs units. Leverage in-term based data to enhance success coaching, persistence and retention.
- Encourage faculty and staff to engage in research in online and digital education and pursue opportunities for presentations and publications.
- Develop multiple levels of assessment strategies that incorporate data from stakeholders and campus units—including their perspectives and needs.
- Set quality assurance standards and metrics for teaching with technology in all modalities.
- Advocate for change, resources, and innovations based on findings. Establish the habit of transparency and continuous improvement, using analytical tools to fuel ongoing quality enhancement.

Key Performance Indicators

- Evidence of the inclusion of online/multimodal learning goals in the institutional strategic plan and accreditation self-studies along with considerations for distance learners, their needs, and their expectations in all areas of the institution.
- Evidence of a Strategic Enrollment Management plan for digital learning. The SEM plan should include targeted growth; targeted learner population; learner success outcomes, persistence, and retention; compilation goals; and financial aid leveraging.
- Existence of recognition, awards, and publications relevant to online and digital learning at the institution
- Existence of institutional definitions relative to online and digital learning:
    - » Online Program: Percentage of required courses available online
    - » Online Learner: Percentage of course enrollments completed online
    - » Course/Program modality: as defined by the percentage of instruction conducted online/digitally
    - » Retention: year-to-year vs. fall-to-fall (to include learners that only enroll in winter/spring terms)
    - » Policies that address instructional capacity, concurrent enrollment, and tuition & fee assessments directly related to online and digital learning experiences

- Existence of data warehousing of enrollment, credit hours, and degrees completed in all modalities at the institution
- Demonstrate efforts to improve the following metrics:
    - » Learner retention/completion rates and post-graduation data respective to and comparatively among modalities (Tinto, 2016; Bettinger & Loeb, 2017; Bettinger et al., 2017)
    - » Employer satisfaction rate for graduates of online programs (annual survey)
    - » Time-to-degree for online vs. on-campus learners by program.
    - » Cost-per-completion by modality and program
    - » Faculty satisfaction and perception of support for online teaching (annual survey) (Marasi, Jones & Parker, 2022)
- Compliance with accreditation, regulations as well as federal and state law

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Hallmark 2: Entrepreneurial Initiatives

Hallmark Overview

Institutions must continually adapt to changing learner expectations, workforce demands, market conditions, and competitive pressures. This hallmark focuses on how institutions identify opportunities, develop sustainable academic and credential portfolios, pursue innovation responsibly, and align growth strategies with mission and institutional strengths.

Major Themes

- Strategic innovation and opportunity identification
- Portfolio management and program viability
- Workforce alignment and market responsiveness
- Credential innovation and lifelong learning
- Partnership development
- Financial sustainability and diversification
- Data-informed planning and decision-making

Connections to Other Hallmarks

This hallmark translates institutional vision into action by connecting leadership and governance (Hallmark 1) with learner needs (Hallmark 4), instructional quality (Hallmark 3), technology-enabled innovation (Hallmark 5), and external partnerships (Hallmark 6).

Most Relevant To

COLOs, continuing and professional education leaders, deans, academic program leaders, enrollment management leaders, workforce development professionals, institutional research teams, partnership leaders, and finance officers.

Readers interested in this hallmark may also wish to review: Hallmarks 1, 4, and 6.

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Hallmark Context

Leading in the online space necessitates an entrepreneurial mindset because it requires creating new capacity inside complex institutions. Expanding access through new delivery models allows institutions to reach new learner populations, advance their mission, strengthen workforce connections, and support enrollment growth. Done well, digital learning can increase both institutional impact and learner opportunity. Approaching digital learning with this entrepreneurial mindset, however, demands a pivot away from conventional programming structures and thinking. Entrepreneurial leaders are willing to question assumptions, test new approaches, and pursue opportunities that may not fit traditional institutional models. They help colleagues see possibilities that might otherwise be overlooked.

Demographic and market pressures are already affecting institutions across the country. U.S. colleges and universities collectively experienced a 15% decline in enrollment between 2010 and 2021 (National Center for Education Statistics, 2023), and the demographic pressure is only intensifying. The number of 18-year-old high school graduates was projected to peak around 3.9 million in 2025, followed by a 15-year decline with traditional-age incoming college students down 13% by 2041 (Lane, Falkenstern, & Bransberger, 2024). Compounding this demographic shift, nearly 29% of Americans now view the cost of higher education as unjustifiable (Education Dynamics, 2025), and non-traditional students, working adults, career changers, and lifelong learners are an increasingly important factor in sustaining enrollment. Digital education, designed with flexibility and accessibility in mind, is one of the most powerful tools institutions have to respond to this new reality.

> Entrepreneurial leadership is not about chasing trends; it is about creating new capacity to advance mission and learner success.

These changes require more than incremental adjustments. They may require institutions to reconsider long-standing assumptions about program development, organizational structures, and learner engagement. Online and digital education requires a set of principles similar to those of any entrepreneurial venture: a focus on market (employer/consumer/learner); a differentiated product (credentials of value); strategic planning and resourcing (business model); and the ability to take calculated, strategic risks and improvise. In addition, issues that can create barriers to entrepreneurial approaches should be identified and addressed, such as institutional brand perceptions, faculty governance and culture, lengthy processes, and program identification.

Entrepreneurial thinking can help institutions respond to two persistent challenges: adapting to change and demonstrating value. Entrepreneurs can explain how their product meets a consumer's needs. The most effective organizations anticipate emerging demands and respond before those demands become obvious to everyone else. Offering access to higher education in flexible and innovative ways demonstrates that higher education is willing and able to meet the public where they are. Being accountable means understanding all of the resources and efforts that go into bringing a program to market and then keeping up with how that changes over time as enrollment rises and falls, as competition enters and exits the market, and as new technology becomes available. Institutions that wish to remain relevant and financially sustainable will need to incorporate entrepreneurial thinking into planning, program development, and decision-making.

Key Elements of Entrepreneurship

- **Support experimentation, rapid decision-making, and responsible risk-taking.** Key stakeholders within the institution must embrace (culturally, socially, financially, and programmatically) experimentation and fast implementation. Teams should be developed to embrace the components of innovation and entrepreneurship.
- **Evaluate online business models.** Ensure online and multi-modal education courses and programs are financially sustainable by evaluating all financial aspects inclusive of Online Program Managers (OPMs), in-house efforts, and consortia using transparent ROI criteria, for both learners and the institution. Ascertain and build a case for new or reallocated resource needs as appropriate, inclusive of faculty (re)sourcing and reallocation and appropriate compensation models. Understand the competition in both credit and non-credit spaces.
- **Examine Opportunity-driven market expansion.** Include impact and market access for those not served by historical models of postsecondary education (e.g., adults, degree completers, incarcerated individuals, active and former military, international, and rural learners) as a formal dimension of program selection and prioritization (Eckerson, Rowe, & McLeese, 2024). Factors should include affordability, debt, and employment outcomes (Bettinger & Loeb, 2017; Bettinger et al., 2017).
- **Credential portfolio strategy.** Develop credential pathways that allow learners to move more easily between noncredit and credit offerings and build credentials over time. Approaches for institutional program subscription, competency-based learning programs, employer-sponsored customized training, and partnership-based models should be analyzed for opportunities.
- **Curate the institution's presence and understand competition.** Identify and articulate institutional brand and reputation, and use market research to establish program differentiation and attributes/ mobilize marketing, recruitment, and enrollment teams around messaging that supports online and multi-modal learning. Evaluate partnerships to achieve institutional goals (Atkins, 2022; McNaughton, 2024).

Why? Creating Opportunities

Entrepreneurship within higher education should not be seen or interpreted as novel or antithetical to the work of institutions. Ecosystem development and maintenance must focus on managing, interfacing, and maintaining developed networks and relationships to allow entrepreneurial approaches to expand. Institutions have existed in an educational marketplace that has experimented with and celebrated new ventures for generations. In fact, innovation is a hallmark of the U.S. educational model and the basis for its global ascendancy for the better part of the last century. As public spending on higher education decreases or declines, an entrepreneurial venture can help cultivate much-needed financial resources that can address existing and emerging needs. Learners are technologically adept and increasingly interested in controlling and personalizing their own educational experiences. An entrepreneurial mindset can enhance an institution's ability to define and expand the institution's brand and reach in the market.

Online is a boundary-crossing system, not a single unit

A lab, a department, and a student service office can improve internally. Online success depends on coordinated changes across:

- Faculty work, development of IP policies and practices, instructional design, IT, disability/access, registrar, financial aid, advising, assessment, procurement, vendors, marketing/enrollment, learner support
- When outcomes depend on other people's processes, entrepreneurial skills to build coalitions, negotiation, and getting work done without formal authority is key.
- When norms aren't settled, leaders of digital learning are practicing entrepreneurship: creating shared language, policies, and guardrails.

Moore's Law and institutional governance are misaligned

- Academic governance and procurement run on semesters and fiscal years. Online platforms, integrations, security expectations, and AI capabilities shift faster.
- Online leaders live in the tension between:
    - » The pace needed to keep things usable/safe
    - » The pace institutions can legitimately move
- Bridging that gap takes entrepreneurial comfort with iteration, risk management, and incremental progress.

Quality is more visible online, which raises the stakes

- In-person teaching has privacy by default. Online courses are more visible (to learners, peers, accreditors, support staff).
- That visibility can trigger defensiveness—especially in cultures where teaching has been treated as highly individual and largely unobserved.
- Entrepreneurship becomes an exercise in trust-building, psychological safety, and professionalizing course design without shaming faculty.

Digital learning is where institutional contradictions show up first

- Access, disability accommodations, academic integrity, learner support capacity—digital learning exposes gaps quickly because there's less buffer.
- Digital learning professionals become early responders, inventing solutions before the rest of the institution feels the pain, many times while guiding and directing the institutional enterprise.

What? Strategic Alignment and Enhanced Relevancy

Before an institution can begin attending to a culture of entrepreneurship, leaders must identify the goals for digital learning. Often, growing resources and revenue along with extending the institution's reach into new or expanded markets are primary goals. While responsiveness is rarely cited as a goal by institutional leaders, it should be paramount as both learners and employers are looking for institutions to support the future of work. Institutional leadership must understand the requirements for successful online programs or other new ventures that go beyond new degrees or research centers. Beyond buy-in, explicit communication and support are essential in new ventures, particularly if they involve new strategic directions or commitments. Beyond full-throated communications and support, institutional leaders should consider cultivating an entrepreneurial mindset by walking through the following questions:

Institutional Strength Alignment

What are the strengths of the institution?

Using an inventory approach, determine areas of strength that are exceptional, developing, or not currently present. How can digital education align with institutional strengths to expand or enhance the institutional mission? How can digital education help eliminate gaps and opportunity areas?

What are the gaps in the institution to support digital education?

Determine the gaps in institutional support and determine if the area is critical to digital education and how it may be addressed. How will these institutional gaps affect the launch of new programming or broaden current programming?

Mission and Brand Alignment

What are critical mission and brand attributes needed for the project?

It is not necessary that every project reflects the full brand identity of the institution; however, each project should have enough brand alignment with the institution so as not to be alien to internal stakeholders. Ventures that fail to align with the institutional brand run the risk of internal resistance, marginality, or eventual elimination.

How does the brand influence the selection and design of a project?

Brand can influence the type of programming that is considered, as well as how an initiative is designed. Programmatic concern may be that brand may be diluted through extending reach. Brand dilution must be addressed through project design. Digital education may also extend the institutional brand nationally and internationally with positive outcomes.

Market Research

What type of market research is necessary?

The more deeply institutions understand the constituencies they intend to serve through online and multi-modal learning, the greater the likelihood of success. Effective market research should extend beyond general trend analysis to include four key domains: market demand, learner segmentation, competitive positioning, and program validation. Demand analysis assesses the size and sustainability of the opportunity, including labor market alignment and regional workforce needs. Learner segmentation provides insight into who the students are, what motivates them, and how they prefer to engage. Competitive analysis evaluates both higher education institutions and alternative providers, identifying areas of saturation or opportunity. Finally, concept and experience validation through methods such as surveys, focus groups, and user experience testing ensures that proposed programs align with learner expectations and employer needs. Together, these approaches enable institutions not only to identify viable markets but to design offerings that are differentiated, responsive, and sustainable.

Coupling trends and competitor analyses can reveal emerging gaps that can be addressed, or market saturation or market domination by other providers that may influence the viability of a new or reconceptualized initiative. Even when a project attempts to build a new market, market research with the target audience is still needed (e.g., user experience testing).

How much market research/intelligence is needed?

Typically, market research is proportional to the risk involved in an undertaking. Critical market questions should be answered with enough confidence to identify the risk required to reach a desired market. Market research/intelligence must clearly identify competitors and emerging areas or subpopulations of learners (e.g., high school graduates with delayed college enrollment, current adult learners in non-credit programs that could transition to degree-seeking students etc.). Likewise, learning how prospective learners perceive the strengths of the institution can be illuminating.

While a lack of consistent metrics makes it challenging to arrive at decisions based on data, the entrepreneurial leader must consistently collect, analyze, and use the data available to impact decisions. Continued evaluation of market saturation is critical to successful program sustainability (Gray, R., 2022). Regular review of markets and programs should occur at the institution on a one-to-three-year rotation. Short reviews may be needed to ensure relevance of programs.

Idea Generation

How are new ideas generated?

Currently, ideas for new online initiatives typically come from internal agents (i.e., faculty, staff, or campus leadership) who, by virtue of their deep understanding of the organization, will have ideas that could become new ventures. External agents (i.e., alumni, employers, or external partners) possess unique perspectives relative to their current and past experiences with the institution. But truly entrepreneurial institutions encourage idea generation through a structured innovation ecosystem which includes market research. Ideas are confirmed with compelling data that informs program development and indicate gaps in either an underserved area or a demographic population ill-served by other institutions.

> Institutions cannot afford to launch programs opportunistically. Growth must be guided by evidence, differentiation, and long-term viability.

What kind of ideas should be generated?

Ideas should serve a market need and can encompass everything from new credential programs to redesigned existing programs, or existing programs offered through a new modality to reach new markets. Perhaps a learner population is targeted in a new way, or curricular innovation is embedded into the digital learning format.

What attributes are used to evaluate ideas?

An objective rubric, based on agreed-upon criteria, can be useful in vetting ideas. Those ideas that meet baseline criteria on goals and brand need to then be tested more thoroughly. Some projects may not fit neatly into the institutional rubric. What data is needed to determine if the idea meets a competitive regional need?

An entrepreneurial university will have structures in place so that ideas can be shared, discussed, and acted on rapidly. Ideas are easy to generate, but vetting and evaluating them requires discipline and focus. Ideas should be evaluated from both operational and strategic perspectives to ensure success. They are highly malleable and should be subject to criticism and improvement. This iterative process typically advances the initial concept while recruiting internal champions and opinion-makers willing to support an idea. An organization open to hearing ideas and perfecting them will be more likely to successfully launch new ventures.

Prototyping is a core entrepreneurial competency because it shifts innovation from abstract enthusiasm to evidence-informed action. Entrepreneurial university administrators do not move ideas directly from concept to launch; instead, they identify the target market, clarify the learner or stakeholder problem to be solved, and test whether the proposed solution is understandable, useful, and desirable. This requires the ability to define audiences, surface assumptions, frame hypotheses, and translate early ideas into low-cost prototypes such as pilot offerings, sample user journeys, draft communications, mock schedules, or preliminary service models. In this way, prototyping reflects a design thinking mindset: administrators begin with empathy for users, develop a concept in response to real needs, and then refine that concept through iteration rather than relying on internal intuition alone.

Entrepreneurial leaders also understand that prototyping is a relational and evaluative practice. Before taking a new program, credential, service, or initiative to market, they engage intended users through focus groups, interviews, user experience testing, and other forms of structured feedback to determine whether the concept resonates and where friction remains. This process helps institutions avoid costly misalignment, improve the clarity and relevance of the offering, and build solutions that are more likely to achieve adoption and impact. In practice, this means administrators must be skilled in listening, pattern recognition, rapid-cycle improvement, and deciding when to revise, scale, or stop. The emphasis on feedback and iteration is consistent with broader institutional practices that use focus groups and other assessment mechanisms to understand stakeholder experience and strengthen strategy over time.

If an idea appears viable, what is the next step?

Simply identifying a potentially viable idea is not enough to greenlight a project. Once an idea has been fleshed out, evaluating it from a market perspective may be necessary. Focus groups, discussions with potential employers, and further labor-market studies can all lead to vital information. This may be enough for a low-cost, low-risk initiative, but as stakes, investment, and entrenchment increase, so, too, should self-scrutiny and caution. Pilot projects may make a project more viable for a test launch. Evaluation and process development should be assessed throughout the pilot stage.

Project Plan

When an idea has been given the green light to proceed, it should meet baseline brand and goal criteria. The first step may be a pilot project with continued review of data and operational evaluation. The next step is to develop a data informed project plan that will anticipate the various steps necessary for launching the initiative.

Resources, Roles, and Responsibilities

The eventual success of an initiative is often predicated on the momentum created by early decisions. Every step in the learner lifecycle should be reviewed from both feasibility and responsibility perspectives. Beyond establishing the need to provide that program element or learner support, leaders must determine if current offices have the capacity to do so and if systems will accommodate learners of all types. The influx of new learners with diverse educational backgrounds and credentials will put strain on any longstanding system. Initial success often determines long-term viability—and a failure to adequately assess the impact of a new initiative can abort what otherwise might have been a sustainable new venture.

Inherent to this conversation are the risks and rewards, and even the necessity of engaging with third party vendors such as Online Program Managers and other vendor relationships.

- Any third-party contracts utilized with digital learning must be transparent, outlining institutional ownership of prospective and matriculated learner data, identifying intellectual property policies with the vendor where course development may be part of the work of the OPM, clearly articulating that academic decisions reside with institutional leaders, and exit strategies and terms are known up front. (Sun, J. C., Turner, H. A., Kinser, K., & Zipf, S. T. 2024).
- Encourage cost benefit analyses that include the review of unbundled services regarding long term brand impact and academic considerations, not just enrollment growth (McKenzie & Lederman, 2020; Swaak, 2025).

Overall, institutions should maintain clear academic, operational, and governance authority over programs delivered through third-party, consortia, or online program management (OPM) relationships. Partnership agreements should clearly define institutional control over curriculum, faculty qualifications, learner data, academic policies, student support, marketing practices, and quality assurance responsibilities (NCHEMS, 2021).

Marketing, recruitment, and enrollment communications should be subject to institutional compliance review processes to ensure alignment with federal and state consumer protection requirements, including misrepresentation regulations, disclosure obligations, and professional licensure expectations. Claims regarding outcomes, employability, transferability, or salary potential should be accurate, substantiated, and regularly reviewed.

Prior to expanding online programs into new jurisdictions, modalities, or professional fields, institutions should evaluate operational readiness related to state authorization, professional licensure compliance, disclosures, clinical placement oversight, faculty credential requirements, and student-support infrastructure. Strategic growth should align with institutional compliance capacity and sustainable operational support (Kerensky & Cheverton, 2026).

Institutions ultimately remain accountable for regulatory compliance, student protections, and institutional integrity in all third-party partnership arrangements. Governance structures for online program managers, recruitment firms, technology vendors, and instructional service providers should include documented oversight processes, contract review standards, audit rights, accessibility expectations, data governance provisions, and clear delineation of institutional authority.

Third party vendor contracts should be scrutinized to ensure the university needs are adequately addressed. Talking with current customers provides insights that cannot be determined through other means. The following items should be part of the contract negotiations:

- Ensure academic control
- Specified faculty engagement which bridges research, theory, and practice gaps
- Academic ownership and intellectual property agreements
- Revenue streams identified and financial strategies are clearly identified and easily explainable
- Retain ability to be agile and responsive to changing market needs
- Alignment of marketing strategy to institution mission
- Accountability and transparency are used as strategic assets
  (Sun, Turner, Kinser, & Zipf, 2024)

An institution may not have the necessary infrastructure to meet the ambitious goals of a new initiative. If that is the case, a range of educational vendors can serve as capacity-building agents on an institution's behalf. Advertising agencies can design campaigns. Enrollment coaching services can manage high-volume lead and application generation. Success coaching may assist students in retention and completion. (Kim, 2018)

Resource Allocation and Business Planning

Capital is essential in making a project successful. Some projects can be supported by internal reallocation of existing budgets; larger projects will need substantial cash infusions. Development funds are critical in bringing all the pieces together. Underfunding a project can mean a degradation of programmatic quality or an anemic marketing plan. All new ventures have an opportunity cost, which needs to be considered in how an enterprise will spend its finite time and money. Finally, every new venture risks failure, which needs to be anticipated with an agile strategy for either a teach-out or a scaling back to a more modest undertaking. A sophisticated modeling template should be developed to analyze scale and levels of revenue over time to assist with generating additional revenue and eliminating or reducing broader institutional needs for support.

Enrollment Management and Student Recruitment and Retention

Recruitment and enrollment management are critical, especially when scale and new markets are at play. Lead generation and cultivation are essential for meeting enrollment targets. Managing expectations is critical; it is always best to exceed low forecasts than to disappoint with lackluster initial results. Support for enrollment management and learner recruitment and retention efforts should be maintained as system infrastructure, data collection and analysis, as well as application materials, may require innovative changes. Students may need specific tutoring and coaching services that are not currently considered for student success initiatives in the digital learning space. Current staff capacity versus necessary staffing for the launch of new programs or initiatives should be considered.

Financial Services, the Registrar, Student Services

The institution's central business offices play important roles in supporting online and digital learning. Financial models that may include new revenue models such as revenue shares or royalty-based incentives may be part of a new project. A project plan should have a transparent communication protocol that notifies others on campus of the particulars of the program and how these will be handled.

Marketing

A new program needs a proper launch date identified through program development and planning. Putting a date on a calendar and committing to it are powerful management tools. They allow energy to be harnessed and focused. Sometimes a soft launch of a program or a subset of its components, including stackable certificates, can prepare a program for its eventual initiation in the marketplace. The launch date can provide a goal by which all operational components are identified through a backwards timeframe.

Every good idea needs a story told by a marketing plan. The marketing plan should address basic messaging about the program and express the value proposition to the intended audience. Determining target markets—and the respective strategies, venues, and financial resources to reach those markets—is critical. A marketing professional should be guiding the conversations regarding awareness, digital marketing, brand awareness, and paid advertising versus earned advertising. Search Engine Optimization and Generative Engine Optimization intelligence should be used to target prospective students.

Who and How? Implementation

Campus Leadership

Campus leaders at the cabinet level, as well as college/school deans, often have the ability to allow success to occur. They can be active supporters and ambassadors of new ventures, particularly in securing campus cooperation and external advocacy. Further, they hold the power to shift resources so that current budgets, likely already constrained, do not have to bear the full burden of new initiatives. Ideally, institutional leaders will have identified a formula to address incremental staffing needed for new programs, regardless of where they are housed and which entity hosts them.

Campus leadership should be well informed of academic entrepreneurship from the COLO, project teams, and alumni, as well as businesses that have utilized digital education services successfully. They should be apprised of the associated startup costs and risks associated with digital learning projects. Data informed discussions should occur throughout the development process to assist campus leadership in their knowledge and ability to support efforts.

Dedicated Project Team

Each new initiative needs individuals tasked with bringing the project to reality. The team should represent a cross-section of the various stakeholders, but their roles should not be limited to a particular narrow or formal function within the institution. It is helpful to have individuals on the team who share excitement about launching a new venture, but who are also savvy about navigating potential university roadblocks.

> The future belongs to institutions that align innovation, workforce relevance, and financial sustainability.

Project teams should be formally charged, motivated, and empowered to work expeditiously through the normal protocols of the university's daily operations. This group of experts should be given ownership of day-to-day decisions, while remaining nimble enough to adjust and modify plans as a situation demands. Whether ad-hoc or more regularized, the project team tasked with program development and implementation should be empowered and accountable—and ultimately responsible for orchestrating all moving parts of the initiative from concept development to launch. As a program becomes assimilated into the infrastructure of the institution, this team can relinquish oversight to an area management team or corresponding unit. Depending upon the scope of the project, a dedicated Project Manager may be required.

Marketing and communication. The marketing and communication team needs to be mobilized to help develop a marketing strategy for the new initiative, as well as to prepare for and execute its launch. Too often, good ideas falter because of an inadequate effort to promote the program.

Enrollment management and learner recruitment. The recruitment and retention teams need to be mobilized to conduct targeted outreach to various markets using technology in search engine optimization and generative engine optimization. Online enrollment processes may move more quickly than those that focus on traditional students. Online students seek quick responses and frequent information about dates and the status of their applications.

Content development team. Instructional design, multimedia staff, and other support content development team members need to develop a holistic sense of the program/project and how it will be developed and launched. The shared vision of the project should be communicated well to participating and prospective learners.

Subject matter experts / faculty members. Subject matter experts (SMEs) need to provide content, develop the curriculum, and design the courses. Release time, additional compensation, and planning grants are frequently used to compensate institutional faculty engaged in the design, development, and delivery of new programs. The institution may need to evaluate current faculty personnel policies and review strengths and gaps to provide strong faculty support for entrepreneurial program launch.

Specialized vendors. Online-enabling companies can help develop courses for online consumption. In contracting external services, realistic entry and exit strategies should also be contemplated. Unbundled service contracts may provide specific services where there is a gap in the institutional capacity.

Legal counsel and procurement. Identify a dedicated person in the university counsel's office. Many times, these entrepreneurial opportunities require a quick turnaround. Establishing templates of MOUs that have been approved by university counsel and are able to be customized will assist the timeline of project work. Likewise, establishing a strong connection with a Purchasing Officer/Contract Specialist will assist with meeting the state and legislative requirements for contract compliance.

Procurement processes for educational technologies and third-party services should incorporate accessibility review, security evaluation, privacy analysis, interoperability assessment, and institutional governance approval.

Key Performance Indicators

Performance indicators for entrepreneurial initiatives depend greatly on stated goals as well as the unit of examination. Among the performance indicators to be considered:

- **Institutional KPIs**
  - » Evidence of intentionality around evaluation and determining when to sunset programming or operations that are no longer current/underperforming
  - » Review institutional margins and strategies to establish ROI
- **Enterprise KPIs**
  - » Evidence of a sustainable and stable financial model for online and digital learning ventures
  - » Existence of criteria for the approval of new programs, inclusive of degree and non-degree credentials delivered via online and digital learning
  - » Existence of MOUs between academic entities and digital learning units
  - » Existence of processes for the design, development, and delivery of new programs
  - » Existence of processes for sunsetting or teaching-out underperforming ventures in ways that protect learners
  - » Existence of compensation practices that incentivize faculty members and subject matter experts to assist with the development of new opportunities, design on curriculum, and delivery of online and digital learning experiences
  - » Evidence of a systematic way to determine market demand for new and existing programs
  - » Percentage of offerings that are stackable into larger credentials
  - » Percentage of programs that are employer-validated

- **Individual program KPIs**
    - » Evidence that the program serves the groups as intended in its design (Eckerson, Rowe, McLeese, 2024; Tinto, 2016)
    - » Evidence of increasing interest from desired population via lead generation
    - » Existence of process to determine if the program is meeting learner and employer needs
    - » Evidence that the program is financially sustainable or that any losses are either temporary or allowable given mission alignment (presumably offset from another area)

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Hallmark 3: Instructional Support

Hallmark Overview

High-quality digital learning depends on collaboration among faculty, instructional designers, academic support professionals, and institutional leaders. This hallmark focuses on the support structures, processes, and expertise needed to design, deliver, and continually improve digital learning.

Major Themes

- Faculty support and development
- Instructional design and learning experience design
- Accessibility and inclusive learning
- Course quality and continuous improvement
- Academic integrity and learner engagement
- Collaborative teaching and support models
- Evidence-based teaching practices

Connections to Other Hallmarks

This hallmark operationalizes the institution's academic mission and serves as a bridge between organizational strategy (Hallmark 1) and learner success (Hallmark 4). It relies on technology ecosystems (Hallmark 5) and contributes directly to quality assurance and continuous improvement efforts (Hallmark 7).

Most Relevant To

Faculty members, instructional designers, faculty development professionals, teaching and learning centers, academic technology leaders, deans, department chairs, and COLOs.

Readers interested in this hallmark may also wish to review: Hallmarks 4, 5, and 7.

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Hallmark Context

To be successful in delivering quality online and digital instruction, instructional talent must have access to institutionally supported professional development, technical support, instructional design expertise, and institutional quality standards.

Instructors who are geographically remote from the campus, and those with part-time or as-needed teaching assignments, should benefit from the same caliber of support as those with on-campus, full-time appointments. Institutions vary dramatically—in organizational structure, resource availability, institutional support for digital learning environments, etc.[4] Implicit across this document is what is likely a shared goal of quality at scale, both in terms of course design and instructional practices.

Key Elements

- **Provide robust development opportunities.** Establish varied and institutionally aligned professional development opportunities inclusive of communities of practice. Support instructors in refining their teaching practices and experimenting with new approaches that improve learning outcomes. Ensure department chairs, deans, and other relevant administrators have the tools and training to evaluate digital teaching.
- **Provide sufficient resources.** Establish scalable support and professional development for course and program growth. Maintain ongoing technical support for instructors and students. Cultivate quality instructional design and course development expertise. Ensure ongoing assessment of instructional support services.
- **Establish and communicate clear expectations.** Develop workload and compensation policies. Detail intellectual property rights and the responsibilities of subject matter experts (SMEs) in regard to content authorship.[5] Detail instructor responsibilities for the delivery and maintenance of courses. Adopt quality frameworks and standards for design and instruction, including guidance on compliance with relevant accreditation, state, and federal regulations. Provide clear policies and procedures on course design and teaching evaluation.
- **Recognize and reward digital pedagogical excellence.** Ensure that promotion, tenure, and merit review criteria explicitly recognize contributions to digital teaching. Develop formal mechanisms for recognizing instructors who demonstrate excellence in online teaching, mentor colleagues, contribute to course improvement, or advance institutional teaching practices.
- **Establish intentional onboarding practices.** Create structured onboarding experiences for all who teach online, including part-time, adjunct, and clinical instructors, that orient them to institutional tools, expectations, quality standards, and available support resources before their first course begins.
- **Cultivate a culture of academic integrity.** Policies, faculty development, student orientation, assessment design, and learning technologies collectively support ethical participation, authentic demonstration of learning, and appropriate use of emerging technologies. Integrity expectations are clearly communicated, consistently applied, and supported through educational rather than solely punitive approaches (C-RAC, 2011; NCHEMS, 2021).

4 For the purposes of this hallmark, the term ‘instructors’ will be used to identify anyone in a primary instructional capacity at an institution. This can include both part-time and full-time faculty, adjunct instructors, tenured and non-tenured faculty, staff, and any other institution-specific job title that describes those who are assigned as instructors of record in digital courses and programs.

5 This hallmark uses the term ”subject-matter experts” (SMEs) to identify those who develop content for digital learning experiences, many of whom are instructors. While some instructional and learning designers may develop content, the use of SMEs distinguishes those who are relied upon to create content as their primary role.

- **Establish AI-augmented course design and assessment redesign.** Help instructors evaluate where AI tools may enhance course design, assessment, feedback, and learner support. Faculty development should focus on practical uses of AI, its limitations, and the academic and ethical considerations associated with its use.

Why? Quality Instructional and Learning Experiences

Instructors who receive ongoing professional development and access to instructional design and technology support are better positioned to create engaging learning experiences and support student success. Likewise, ensuring instructors receive appropriate training and support will strengthen the institution's reputation and reduce the risk of non-compliance with state and federal regulations, particularly regarding Title IV aid and digital accessibility standards.

Digital accessibility must be treated as both a learner success priority and a legal compliance obligation. Institutions should establish institution-wide accessibility governance aligned with ADA, Section 504, and applicable WCAG standards, including processes for continuous review of course content, procurement, remediation, faculty support, and vendor accountability. Accessibility compliance should be embedded into instructional design workflows rather than treated as an after-the-fact accommodation process.

Likewise, institutions offering digital education should establish course design, professional development, and instructional oversight practices that support compliance with federal Regular and Substantive Interaction (RSI) requirements (Distance Education, 34 CFR 600.2., 2024). Policies and training should ensure that online learning environments include instructor-initiated, academically substantive engagement that is documented, reviewable, and aligned with the definitions of regular and substantive interaction found in the distance education definitions of 34 CFR 600.2 (2024).

> Quality digital learning is never the work of a single individual—it is the product of collaboration among educators, designers, technologists, and support professionals.

Institutions that invest in instructional support and quality see the returns across student learning, retention, completion, and satisfaction outcomes as well as future enrollment that strengthen institutional reputation and long-term competitiveness (Gurley, 2018; Jarvie-Eggart et al., 2023; Pascale, Ehrlick, & Lovins, 2026; Martin, Budhrani, & Wang, 2019; Mixson-Brookshire, Goldfine, & Habers (2023); Van Wart et al., 2019).

Higher education institutions have a poor track record of putting instructors into classrooms without much preparation beyond a teaching assistant (TA) experience, hoping they will survive and thrive as instructors. Teaching is both an art and a science. Providing the support of Instructional designers—those with advanced training or credentials in instructional design, education, learning sciences or a related field—brings research informed expertise in course design, pedagogy, accessibility, and assessment to the design and development process that complements instructors' deep disciplinary knowledge. The resulting courses are more coherent and effective for students, regardless of the modality. Instructional designers help faculty align learning objectives, instructional activities, and assessments. They bring expertise in pedagogy, accessibility, and course design that complements disciplinary expertise and helps instructors make informed teaching decisions. This partnership is even more critical for digital teaching and learning because, unlike face-to-face instruction, online courses make the design of learning visible and consequential—there is no room to rely on in-the-moment improvisation, informal cues, or tacit structures that often carry in-person classes.

What? Integrated Support

Supporting the development and delivery of online courses can take various forms. Institutions should consider every potential touch point where support may be needed. To enable instructional talent to focus on creating the best possible learning experiences, it is most effective if they can rely on a constructive and collaborative partnership throughout the process, including implementing technology, pedagogy, instructional design and development. Likewise, institutions should offer guidance on how to create learning experiences that are engaging, motivating, and provide opportunities for human connection.

Instructors must have access to resources that will help them be successful in the online environment. These resources should combine both institutional and discipline-specific perspectives. Online course development requires access to a range of experts who can ensure that a course comes to life. Supporting online instructors is not just about having robust knowledge bases, templates and training, but also about having access to instructional support professionals who are knowledgeable, supportive, and caring.

Further, department chairs and other administrators need to understand the support services available to those teaching online and multiple modalities and the quality standards for teaching with digital technologies. They should not only refer instructors to these services but also leverage these tools and knowledge in their ongoing support and evaluation of faculty. There must be a clear understanding of institutional expectations for teaching with technology, regardless of modality. These expectations should be reflected in faculty personnel policies, including how teaching effectiveness is assessed within digital learning environments and pedagogies. It is critical that the institution sets clear expectations and monitors, supports, and rewards teaching talent so they can achieve a high level of performance.

Recent studies highlight the areas where institutions can better support online faculty. Adequate and effective professional development, clear and consistent policies related to intellectual property, and meaningful opportunities to engage with other online faculty have surfaced as areas of concern for some online faculty. By addressing these issues, institutions can signal their commitment to high-quality online education. Given the importance of a well-engaged faculty to both student and institutional success, institutions must be proactive in developing the resources and support instructors teaching in digital environments. (Marasi, Jones, & Parker, 2022, Rodezno & Shahjahan, 2025).

Institutional Policies for Teaching in Digital Environments

Leaders seeking quality experiences for those engaged in teaching and learning online should consider the following contexts when establishing policies:

- Instructors may be geographically distant from campus
- Workload and equivalencies for teaching with digital technologies
- Compensation and incentives for teaching, course development, course redevelopment, and participation in digital learning professional development
- Course design and re-design timelines, and requirements, inclusive of accessibility, and the availability of course development resources
- Responsibilities for the use and ongoing maintenance of course templates (if available), including support for instructors using the template, as well as guidance on the review and revision of the content contained therein
- Intellectual property rights and responsibilities of authorship

- Academic freedom in digital environments, including the ability for instructors to make pedagogical choices while aligning with institutional standards and quality expectations
- Roles of support units such as teaching and learning centers and online/digital support entities, as well as mechanisms for instructors to provide feedback on these support services

Instructional Alignment

Strategic planning for success in online education should be aligned with institutional policies around instructional commitment, time allocation, compensation, tenure and promotion as well as the resources needed to ensure continued success in online programs.

- Encouraging formal recognition of digital teaching and course design in offer letters as well as in promotion and tenure guidelines (Bates, 2022; Bettinger & Loeb, 2017)
- Explicitly addressing the time demands of online teaching, with workload models that account for design, communication, and individualized feedback
- Advocate for categories and advancement pathways for all instructors, to recognize experience, years of online teaching, awards received, classes/professional development completed, etc.
- Provide incentives or recognition for instructors who take on extra projects such as mentoring others, oversight of a content area, high-enrollment or high-touch courses, etc.

Instructional Preparedness

Selecting an instructor with previous experience teaching in a variety of modalities supports a successful instructional outcome. Even with previous experience, an instructor will need onboarding and support to get up to speed in a new instructional context.

Instructor Selection

The determination of qualifications and experience for teaching is the first step in preparedness. Institutions should establish and communicate clear policies and procedures for identifying instructors for online courses including qualifications and experience, who determines them, and who approves instructional selections and assignments.

> Effective instructional support builds capacity, not dependency.

Institutions should ensure that instructors teaching in digital environments have appropriate academic credentials, disciplinary expertise, and preparation for online teaching, including familiarity with the technologies used to support learning. Staffing models, faculty workloads, and instructional support structures must be regularly evaluated to sustain instructional quality, learner engagement, and institutional effectiveness at scale (C-RAC, 2011; NCHEMS 2021).

Instructor Onboarding

Prior to teaching an online class, instructors should receive adequate time to engage in professional development relevant to online teaching and learning. This programming often includes information on institutional goals for quality online teaching, institutionally supported technologies, institutional course design and/or teaching expectations, as well as online teaching principles and pedagogy. Further, a mentoring program can assist new online instructors in feeling connected and confident by pairing them as co-teachers with more experienced online instructors.

The volume of what instructors new to online teaching must learn and manage can be overwhelming. This is especially true in their first semester of teaching online. Course design and instructional strategies are an important component, but there are also all of the related elements of teaching that need to be addressed, such as how to refer students to advising, tutoring, etc., and an understanding of FERPA, accessibility, disability services and the like, etc. Onboarding and development pathways that make it easier to navigate the learning curve and keep up with changes are important facets to instructor onboarding.

Examples of instructionally relevant institutional information include:

- Human Resources Information
  - » Key human resource information relevant to their course assignment
  - » Payroll policies and benefits information accessible to adjunct instructors teaching from a distance
  - » Compensation (both in release time and over-base/load) for full-time instructors
  - » Online instructors' evaluations and their impact on future course assignments, if applicable
- Contact Information
  - » Key individuals that support online and digital education: the course design team, online program management staff, student support staff, etc.
- Technology
  - » Instructional technology requirements and provisions (e.g., institutionally supplied devices vs. personal devices)
  - » Overview of the learning management system and other available instructional tools
- Institutional Policies for Online Teaching
  - » Clear guidance regarding institutional expectations for technology use, including artificial intelligence, for both instructors and students. Information about key policies, including FERPA, intellectual property, course ownership, academic integrity, grading, accessibility requirements, library and virtual laboratory services, fair use of outside materials in a course, student anti-plagiarism software, etc.
  - » Information related to copyright and intellectual property rights, along with a respect for the intellectual property rights of the materials of others that might be incorporated into online courses
- Student Services
  - » Overview of available student support services such as tutoring, career services, writing support, and accessibility/disability services, mental health, along with whom to contact and what steps must be taken to make accommodations for learners
  - » Key academic offices and deadlines such as the registrar's office and term calendars inclusive of add/drop/withdrawal dates, grading, student conduct issues, and where to seek counsel for issues that might arise in their courses
- Clear expectations and institutional guidelines which can be used in the development of syllabi and course rubrics, requiring that each clearly articulates key learning outcomes and demonstrates how those outcomes align with course assessments. This should include recommendations, informed by institutional instructional leadership, on course-level policies for missed work, academic integrity, online etiquette, the use of AI (by both instructors and learners), and grading standards.

Shared Governance and Trust

Ensure instructors understand the role they play in the shared governance processes with the institution and, specifically, within the program where they are teaching.

Faculty/Instructional governance committees, particularly those charged with online teaching excellence, can identify policies, procedures, and support systems that encourage an interest in teaching online and a commitment to high-quality courses. For campuses with unionized instructional roles, it is important for both instructors and staff to be aware of how collective bargaining agreements may impact teaching evaluations, compensation, workload, and other activities relating to instruction.

An advisory or steering committee composed of instructors, administrators, alumni, and students can provide a means for soliciting input and guidance regarding policies and practices for the institution's online efforts.

For those responsible for supporting instructors, the relationships they build across campus directly impact their ability to provide effective support. Trust is the currency of instructional design, as instructors are far more likely to work with and support design teams they trust. For campuses that are unionized, this means developing familiarity with the collective bargaining agreement and building positive relationships with union representatives. Likewise, strong working relationships with partners that also support instructors, such as human resources, advising, disability services, etc., is helpful.

Professional Development

Instructors must be continually supported, perhaps incentivized, to attend professional development opportunities that are high quality, consistent, and available through a variety of formats and technologies. Incentives need not be monetary; rather, instructors can be encouraged to attend by including professional development as an element of tenure and promotion. Professional development opportunities may focus on institution- or program-specific administration and teaching, institutional workshops, seminars, mentoring arrangements, a faculty fellow program, and/or an online learning community of practice designed for peer-to-peer discussions among instructors who teach online.

Some professional development topics to consider:

- **Digital pedagogy and online course design frameworks.** Utilize evidence informed digital pedagogy (e.g., Bates's *Teaching in a Digital Age*) along with the use of established quality rubrics (e.g., Quality Matters, OLC Quality Scorecard) as design tools rather than compliance checklists (Bates, 2022)
- **Universal Design for Learning (UDL) and accessibility.** Provide sustained support for instructors to design courses using Universal Design for Learning and accessibility principles, recognizing learner variability and legal obligations (CAST, 2024, Tobin & Behling, 2018)
- **Agentic AI and academic integrity.** Support course and assessment redesigns for an AI-rich environment, including assignment types that leverage AI for learning while maintaining integrity (Ncube et al., 2026; Bittle & El-Gayar, 2025; EDUCAUSE, 2023; U.S. Department of Education, Office of Educational Technology, 2023). Additional opportunities exist to provide professional development on how AI can be used to personalize student learning. Instructors should be made aware of the risks and ethical considerations of using AI to create course content (e.g., intellectual property, copyright, accuracy).

- **Immersive media and instructional technology.** Use immersive media and instructional technologies to create interactive learning environments that promote regular and substantive interaction in compliance with the distance education definitions found within 34 CFR 600.2 (2024).
- **Modality agnostic pedagogical training.** Address topics such as understanding online learners, strategies for facilitating effective discussions, fostering student engagement, and teaching higher order thinking, etc.

Additionally, professional association conferences and webinars are important resources for ongoing professional development opportunities.

Through dialogue and exchange of ideas and practices across programs, ongoing institutional support should encourage reflection on teaching practices, assist instructors with emerging technologies, and provide the foundation for continued pedagogical improvement.

Course Design

Access to, and collaboration with, a course development team provides instructors with much-needed assistance in course development and access to pedagogical support and rich content creation for online learning. Further, a design team may assist with video production and editing support as well as immersive media development, enabling new approaches to course content and the presentation of concepts. Instructional design expertise can support the development of concrete learning outcomes, assessment tools, and communication methods that will assist instructors in the smooth operation of their course. Support in course design should be provided by the institution through organization structures that are made clear to instructors. Support can utilize course templates, clear guidelines, and other mechanisms that support instructional independence and grow the ranks of peer trainers and mentors.

Course Review

A policy and procedure for the consistent and regular evaluation of courses for the use of new technologies and innovations, along with updated web resources, should be established. For example, many institutions adopt a three-year cycle or other periodic review structures to ensure that gaps, obsolescence, or redundancies have not crept into the curricula.

Program and course review processes should include documented evidence of resulting improvements and institutional action. Findings from learner feedback, assessment data, instructional review, technology evaluation, and workforce alignment efforts should inform curriculum redesign, resource allocation, faculty development priorities, learner support strategies, and strategic planning processes (C-RAC, 2011; NCHEMS, 2021).

Technology

Appropriate technology: Ensure the institution supports an ecosystem of technologies to meet the robust and different needs of instructors from various disciplines. The challenge is twofold: possessing the right set of technologies and ensuring both the technologies and the instructors who use them are supported. It should be clear who is responsible for the use of technology, in the creation, maintenance, and revision of courses.

Emerging technology: Establish a clear institutional process for evaluating, piloting, and communicating guidance on emerging technologies, especially for rapidly evolving tools, such as AI.

Minimum technology standards: Establish and communicate baseline hardware, software, and connectivity requirements for those teaching online. Institutions should also determine if virtual access to campus computing resources is required. Many expensive and difficult-to-install software programs can be hosted centrally by the university. Instructors should have the same, if not more access to virtual laboratories as that afforded to distant learners.

If instructors are expected to use their own personal technology, institutions must provide initial setup support for their equipment, as well as access to technology support. Ideally, institutions provide the hardware, software, and training necessary for instructors to access the virtual classroom and perform common teaching practices/functions (e.g., communication, grading and feedback, assessing learning) and university services.

> Accessibility, engagement, and quality are not competing priorities; they are inseparable components of effective learning design.

Institution-specific Technology. Provide instructors with information on any technology they are expected to engage with that is specific to the institution. For example, many institutions employ early alert systems that notify instructors of students who may not be making satisfactory progress in their studies, based on institution-specified criteria. Many part-time instructors are hired close to the start of a term in lower division courses that have such systems deployed. Instructors who are expected to take action on any alerts must receive training on what an appropriate intervention is given a specific circumstance; what, if any, actions will be taken automatically on their behalf by such a system; and whom to contact for assistance with any alerts or student needs that might arise.

Foster a Peer Learning Community

Building belonging and collegial connections among online and digital instructional talent requires intentional infrastructure that reflects how people connect today.

- Provide access to synchronous and asynchronous collaboration platforms including virtual meeting spaces, collaborative workspaces, and discipline-specific channels where peers can share resources, ask questions, and build meaningful peer relationships
- Organize communities of practice around shared pedagogical interests, modality, or disciplinary areas to deepen engagement and create organic peer mentoring relationships

Who and How? Inter-unit Collaboration

Teaching and learning support varies considerably across institutions in its structure, scope, and placement within the organizational hierarchy. The functions described in this section represent areas most commonly provided, though institutions organize these resources in different ways. Some institutions maintain separate units to provide online and digital learning support, instructional design, and professional development, while others consolidate these functions into a single, integrated center that serves as the primary institutional resource for instructors seeking support regardless of the teaching modality.

Teaching and learning support units should provide specialized content to prepare and support those teaching online. When teaching and learning support is spread across multiple units (such as instructional design, educational technology, professional development units, etc.), a deep partnership must exist between the various providers. This will allow for alignment in the guidance they provide to instructors. These entities should share a common goal of preparing instructors to teach in multiple modalities in courses and programs that are interactive and high quality, helping instructors evolve as educators.

Common areas of teaching and learning support include:

- **New instructor onboarding.** Provide structured orientation and onboarding experiences for new instructors that establish foundational expectations and introduce available resources before teaching begins or early in their teaching role
- **Ongoing professional development programming.** Design and deliver high quality, varied professional development opportunities that address emerging pedagogical needs, technology integration, accessibility, and evidence-based teaching practices
- **Individualized consultation services.** Offer one-on-one consultations with instructional designers, educational technologists, and pedagogical specialists to support instructors at any stage of course design, development, or revision
- **Quality assurance and course review.** Partner with instructors to conduct course reviews using established quality frameworks, providing constructive, collegial feedback that supports continuous improvement rather than compliance monitoring
- **Educational technology guidance.** Help instructors evaluate, select, and effectively integrate technology tools that serve their specific instructional goals, including emerging technologies such as generative AI
- **Research and scholarship of teaching and learning.** Support instructor interest in investigating their own teaching practice through the scholarship of teaching and learning (SoTL), connecting pedagogical innovation to professional growth and institutional knowledge
- **Community building and peer learning.** Facilitate peer learning communities, peer observation programs, and collegial networks that foster a culture of reflective practice and shared professional growth

Institutional Resources Supporting Instruction

Libraries

At some institutions, accessing library materials remains a barrier for learners. Institutions should identify services available to both instructors and learners (e.g., e-journals, book borrowing, reserves, etc.). A library liaison should be available to provide instruction and support on research, academic integrity, and citations relevant to the course's discipline. Some institutions embed librarians directly into online classes to provide direct support, thus shrinking an important access gap for learners. During the course development stage, online instructors and their course design teams can be catalysts for more purposeful relationships with librarians.

Course Material Acquisition

Institutions should facilitate easy access to print or online course materials through the availability of a contact person. Required textbooks or other instructional materials should be identified as early as possible to allow time for the instructor to become fully familiar with course materials. Instructors should be encouraged to consider open educational resources to assist with the use of materials in an online environment.

Beyond convenience, providing students and institutional offices with information on course materials is a compliance issue for institutions. Institutions are required to provide information on any required course materials, the costs associated with them, and the methods of procurement to the appropriate office on campus (likely the bookstore), allowing students to locate the necessary materials before the course begins. Doing otherwise risks a compliance issue with Title 20 of the U.S. Code (2024).

Learner Support Services

Those teaching online need to be familiar with the learner support services available and know how to facilitate a smooth hand-off to those resources. This may include, but should not be limited to, advising, tutoring, writing support, accessibility resource services, career services, interpersonal misconduct and harassment policies and support resources, well-being counseling, and other workshops and services.

Making this information available to all instructional staff via onboarding, previously mentioned above, will help ensure that all learners have access to the support they need. Institutions should embed standard information in every course, ideally via course templates regarding available student services and resources. Embedded information, when updated by learner support professionals and incorporated into all course sites, eliminates a burden from instructors.

Institutions offering programs leading to professional licensure or certification should provide clear, timely, and student-centered disclosures regarding state-specific licensure eligibility, educational requirements, relocation implications, and program limitations. Institutions should establish coordinated advising processes to support prospective and enrolled students in understanding how location and state-specific requirements may affect educational and career pathways. Institutions should regularly evaluate whether compliance-related enrollment restrictions disproportionately affect access for learners in specific states, regions, or professional pathways. Institutional decisions regarding authorization and licensure eligibility should consider implications for educational equity, workforce access, and student mobility (Kerensky & Cheverton, 2026).

Key Performance Indicators

- **Instructor-focused indicators**
    - » Existence of instructor satisfaction surveys focused on their experience developing, designing, and delivering online and digital instruction
    - » Proportion of online instructors who complete initial and ongoing PD tied to recognized standards
    - » Evidence of integration of online teaching excellence into instructor evaluations and reward structures
        - ▷ Promotion, tenure, and merit review criteria explicitly recognize contributions to online and digital teaching
        - ▷ Formal mechanisms exist for acknowledging instructors who demonstrate innovation, quality, mentorship, and leadership in the digital learning environment

    - Existence of policies that detail the role and responsibilities of instructors
        - Workload and equivalencies for online and digital teaching
        - Compensation for in-load and over-load teaching
        - Course design and re-design incentives and resources
        - Intellectual property rights and responsibilities of authorship
        - Ensure all course accessibility requirements are met
    - Existence of sample instructor policies made available to instructors:
        - Missed participation/work
        - Plagiarism
        - Online etiquette
        - Instructor's use of AI
        - Learner's use of AI
        - Grading standards
        - Communication expectations (e.g., what information emails from students must contain, instructor response time expectations, etc.)
- **Learner-focused indicators**
    - Existence of course evaluation items tied specifically to the modality and course design
    - Student outcomes (learner retention rates, satisfaction) disaggregated by instructor professional development participation.
        - End-of-term course reports

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Hallmark 4: Learner Support

Hallmark Overview

Digital learning enterprises exist to support learner success. This hallmark focuses on the services, policies, and support structures that help learners access programs, persist to completion, achieve their goals, advance their careers, and continue learning throughout their lives. It emphasizes coordinated support across the learner experience.

Major Themes

- Learner-centered design and services
- Advising and academic support
- Student success and persistence
- Accessibility and belonging
- Comprehensive learner support
- Data-informed interventions
- Lifelong learning and learner mobility

Connections to Other Hallmarks

This hallmark represents the ultimate expression of many institutional investments described elsewhere in the framework. It depends upon effective leadership (Hallmark 1), instructional quality (Hallmark 3), technology-enabled services (Hallmark 5), and workforce alignment efforts (Hallmark 6).

Most Relevant To

Student affairs leaders, academic advisors, learner success teams, retention specialists, accessibility professionals, enrollment management leaders, institutional researchers, and COLOs

Readers interested in this hallmark may also wish to review: Hallmarks 3, 5, and 6.

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Hallmark Context

Online education is not merely a transactional relationship with learners. When effectively designed, digital learning creates meaningful educational experiences that foster both academic engagement and a sense of connection to peers, instructors, and the institution. The digital delivery of instructional content has matured dramatically over the past four decades, accelerated by the disruptions of the COVID-19 pandemic. Institutions now treat digital learning as a core strategy as they face declining on campus enrollment and shrinking resources. The pressure to scale online programs efficiently is rising, and leaders must confront the reality that rapid expansion can directly affect the learner experience—the hallmark most vulnerable to cost-cutting and operational shortcuts.

For a time, online program management companies (OPMs) and other third-party providers filled gaps in expertise and capacity when it came to learner support. But budget constraints, political scrutiny, and growing institutional awareness have cooled enthusiasm for outsourcing services and sharing tuition revenue. Moving forward, institutions will need to maintain high-quality learner support while serving larger and heterogeneous learner populations. Institutions should maintain transparent, accessible, and equitable processes for learner complaints, appeals, grievance resolution, and consumer protection concerns across all modalities and jurisdictions in which learners are served. Public-facing information regarding program expectations, costs, licensure implications, refund policies, accessibility accommodations, and institutional responsibilities should be accurate, current, and readily accessible (C-RAC, 2011; NCHEMS, 2021).

> Digital learning is not merely the delivery of content—it is the design of a complete learner experience.

Recent work from WGU Labs and the Institute for Higher Education Policy (IHEP) suggests that belonging and day-to-day learner experiences can be just as predictive of learner outcomes as traditional academic supports—especially for post-traditional learners (Eckerson, Rowe, & McLeese, 2023; Xu, L., & Brown. S., 2024).[6] Learner support that intentionally cultivates belonging and connection recognizes that feeling accepted, respected, and supported is tightly linked to engagement, persistence, and success for online learners (Kahu et al., 2013; Tinto, 2016; Eckerson, Rowe, & McLeese, 2024; Xu, L., & Brown. S., 2024).

A significant percentage of an institution's digital learners may never set foot on campus; therefore, effective instruction and learner support services must be designed to serve remote populations. Support available to remote learners should be comparable in quality, responsiveness, and availability to that provided to learners who regularly engage on campus. Learners should have equitable access to library services, academic technologies, discipline-specific resources, laboratories, tutoring, and digital learning materials necessary to achieve program outcomes regardless of location or modality. Institutions should regularly evaluate the adequacy, accessibility, and usability of these resources in support of learner success (C-RAC, 2011; NCHEMS, 2021).Every learner requires academic and social support, regardless of modality.

6 In 2013, the American Council on Education released, Post-traditional Learners and the Transformation of Postsecondary Education: A Manifesto for College Leaders, authored by Louis Soares. In it, post-traditional learners were defined as, "individuals already in the work force who lack a postsecondary credential yet are determined to pursue further knowledge and skills while balancing work, life, and education responsibilities." (Soares, 2013)

Key Elements of Learner Support

- **Design for quality.** Use data-informed approaches to create specialized services and interventions to ensure a quality experience for digital learners
- **Create community.** Foster community engagement among learners that takes into consideration their backgrounds, experiences, and goals
- **Align support.** Administer and monitor support inclusive of technological, academic, and holistic learner support services
- **Comprehensive learner analytics.** Cultivate an ongoing and segmented analysis of the online learner profile to include those who do not persist
- **User/Learner perspectives.** Involve the learner's voice in the design of systems, strategies, and solutions
- **Support learner ownership and portability.** Institutions should enable learners to retain access to verifiable records of learning, credentials, and achievements beyond enrollment and across educational, professional, and workforce transitions (1EdTech Consortium, 2026a; 1Edtech Consortium, 2026b).

Why? Learner Success

Because online learners may differ from campus learners in geographic proximity, native language, culture, age, motivation, and persistence, an extensive support system is needed to facilitate their success in the online learning environment. The challenge is to provide a holistic experience without the advantages of proximity. The goal is to provide opportunities for learners to engage with their peers before, during, and after their formal learning experiences conclude.

Effective learner support systems and community engagement increase learner retention and satisfaction and are especially critical for degree-seeking students during their first two terms (Kish, 2025). They become more invested in completing their program of study as they experience success and satisfaction over time.

Creating a strong online learning experience requires coordination across academic leadership, instructional design, advising, technology support, and student services. The institutions that do this well are those that treat online learners as full members of the academic community, from inquiry through graduation.

Institutions need to think carefully about how to recreate (or even improve) the sense of support and connection students might experience on campus. When done intentionally, online programs can expand access while still fostering meaningful engagement and persistence.

What? Integration and Holistic Support

Learner support systems can take various forms. Successful institutions anticipate the support that is needed at every potential touchpoint. The institution must encourage ongoing dialogue with learners. The goal of learner services is not simply to respond to problems or technical needs but to create and sustain relationships and services that provide the context for the total educational experience and beyond.

Universities must become student-ready, rather than expecting students to arrive at university/college-ready. In online education, that principle should guide the approach to redesigning systems that truly support learner success. Institutions have an opportunity to innovate and lead in transforming the higher education enterprise.

Reducing friction must become a core design principle, much like the Universal Design of Learning. Every transition or additional step in a process introduces the potential for learners to slip through the cracks; it adds complexity, cognitive load, and the need for additional coordination and potential role confusion. Leaders in higher education must recognize that those burdens impact online and post-traditional learners more than on-campus students.

Successful system change moves beyond layering services onto a complex infrastructure and technology stack and instead reshapes the underlying architecture to be intuitive, embedded, and seamless, and always flexible and accessible for users, inclusive of students, instructors, and administrators. Workarounds that reduce complexity for learners while shifting the burden onto staff or instructors are not real solutions; they are simply temporary fixes.

Leading institutions design integrated, learner-centered systems that support seamless digital registration, grading, credentialing, and communicating course changes; they leverage data to continuously improve processes; and they proactively align policies and communications with evolving regulatory, technological, and learner needs. This may include digitizing credentials/transcripts (i.e., comprehensive learner records), logging common issues and student requests to support continual improvement, and keeping pace with (and designing student supports around) legal and policy changes that impact the student experience. Key areas to consider include:

Early Planning

Learners

Understand the types of learners who will be attracted to online learning. While a growing number of online students are more traditionally aged, first-time students, many more are post-traditional learners possessing transfer credits (McNeely & Sumner, 2022). Learners expect pre-admission advising and credit tabulations when choosing an institution, as many do so based on the number of credits they expect to receive. The ease of the 'shopping' process for prospective learners needs to be considered, as well as the tools available, which will allow them to determine, unofficially, how their transfer credits will count towards a program.

Establishing student-friendly policies around returning learners and transfer credits, as well as recognizing other prior learning, can help to support online learners, while also supporting those populations on-ground as well (Klein-Collins et al., 2020). It is critical to emphasize the importance of clearly communicating how transfer credits are reviewed, what institutional policies are in place regarding credit age, and what the appeal process is. Many online learners come in with prior credit, so having clear policies and procedures is far more important with this population than that of traditional, in-person undergraduates (Courturier et al., 2026; McKenzie & Lederman, 2020). Additionally, programs and processes designed to assist stop-out students to a returning student status can create an educational pathway that benefits both the institution and learners.

An institution's obligations to learners do not end with the awarding of credentials. Institutions should maintain appropriate records and support credential verification throughout the learner lifecycle. Processes should ensure the integrity, authenticity, portability, and ongoing verification of digital credentials, learning records, and evidence of achievement, regardless of instructional modality or credential type, including both credit and non-credit learning (1EdTech Consortium, 2026a; 1EdTech Consortium, 2026b; AACRAO Alternative Credentials Workgroup, 2022).

Disclosure of Licensure and State Authorization

Institutions providing programs associated with professional licensure or certification must communicate clearly and proactively regarding state authorization status, licensure eligibility, field placement requirements, and jurisdiction-specific obligations that may affect learner progression and employment opportunities. These disclosures should be posted on websites and in all promotional materials produced by the institution (Kerensky & Cheverton, 2026; Carroll, et al., 2023).

Credit for Prior Learning / Credit for Current Learning

College-level learning is not constrained to formal courses offered by institutions of higher education. Learning occurs across multiple settings, at different points in time, and through a wide range of sources, including those skilled through alternative routes (STARS).[7] Learner support structures must include pathways for learners to earn credit for prior learning. Beyond the motivation benefits and the benefits of saving time and money on a degree, the availability of credit for prior learning (CPL) can be a deciding factor when a learner considers enrolling at an institution.

The lack of CPL may seem strategic from a fiscal sense, as more credits will be earned and paid for by learners at an institution, but this is shortsighted. Akin to the cannibalization argument, many on-campus administrators caution about online programs sourcing students from on-campus programs, CPL does not reduce the number of credits a learner will earn at an institution. Rather, it will increase the number of learners with existing college-level learning who will choose to enroll at an institution, constituting a net gain in credit hour production and revenue. With a shifting credential ecosystem, CPL can be a strategy that distinguishes an institution as 'adult-friendly' and in keeping with learning mobility principles.[8]

Accounting

Ensure billing and payment practices are convenient and appropriate for online learners. Processes for using these services and handling financial matters should be clearly posted in an easily accessible location. Payment methods should include and align with third-party payment options (e.g., employers or workforce boards, military benefits, grant programs, etc.), which can make learning more affordable. Align payment and refund deadlines for shorter-term credentials and experiences rather than full academic terms. Support and help learners connect with alternatives to traditional financial aid; this might include private loans, government programs, local scholarships, etc.

Course Design

Course design is an essential foundation of learner success. It begins with courses that are intentionally and universally designed to focus on learning experiences and access. Instructional design extends beyond organizing content; it is the intentional creation of coherent, engaging, and accessible experiences that support the achievement of clearly defined and aligned learning outcomes. A supportive environment includes a consistent structure and organization, clear instructions that describe how to progress through the material, meaningful opportunities for interaction and reflection, and community-building elements.

7 Opportunity@Work defines those Skilled Through Alternative Routes (STARS) as "Working adults who have a high school diploma, but who do not have a bachelor's degree." (Opportunity@Work, n.d.)

8 In 2025, The American Association of Collegiate Registrars and Admissions Officers (AACRAO) coined the phrase learning mobility to define the activities that "facilitate the seamless evaluation and documentation of learning." In 2026, the Strada Foundation created the National Learning Mobility Collaborative, which included the recognition of prior learning as one of its principles (American Association of Collegiate Registrars and Admissions Officers, 2025; American Association of Collegiate Registrars and Admissions Officers, Education Design Lab, Strada Education Foundation, and Arizona Learning Mobility Collaborative, 2026).

Effective academic leadership explicitly communicates clear standards for course quality, including alignment of learning objectives, assessments, and rubrics; compliance with regular and substantive interaction (RSI); and adherence to academically recognized quality assurance frameworks.[9] Course design is an important component in learner success. A chaotic, confusing learning environment with competing instructions and vague assignments will quickly disengage learners. Professional course design should be provided by the institution, ideally through a centralized production unit, or by making templates and clear guidelines available for use in a more independent model.

Digital learning environments should be intentionally designed to support meaningful, regular, and substantive interaction among learners, instructors, instructional teams, and learning resources. Institutions should establish expectations and support structures that promote instructional presence, learner engagement, active participation, and evidence-informed pedagogical practice across modalities (C-RAC, 2011; NCHEMS, 2021).

With the growing integration of AI, universities are also reexamining course design to intentionally incorporate AI into student learning and assessment. This shift encourages instructors to move from a primarily compliance-focused role to one centered on guidance and mentorship, while helping learners engage more deeply with course material and demonstrate their learning in new ways. When thoughtfully implemented, this evolution in course design further strengthens the overall learning experience and supports improved learner outcomes.

Curricular Relevance

Regardless of modality, institutions must support learners by helping them recognize and communicate how their higher education courses build the durable skills needed in the workplace. Learners must understand the value of their education and be able to articulate its value; otherwise, higher education will continue to be criticized for low return on investment (ROI) and questionable value. Many universities are trying to accomplish this task by creating microcredentials for instruction that already exists. Integrating durable skills into the core curriculum and ensuring that students can clearly articulate to employers how they developed these skills throughout their education is both essential and strategically valuable.

Accessibility

Effective course design applies Universal Design for Learning (UDL) by proactively supporting diverse learners through varied engagement strategies, accessible and multimodal content, flexible demonstration of learning, and strong alignment between objectives, activities, and assessment. UDL reduces barriers to learning and ensures that institutions proactively engage learners of all backgrounds and abilities. (CAST, 2024; Distance Education, 34 CFR 600.2., 2024).

While UDL strengthens inclusive design for all learners, leading institutions embed accessibility as a core institutional standard and sustain coordinated partnerships with the campus disability services office to ensure approved accommodations are consistently implemented in online learning environments. Accreditors expect accessibility and inclusive design to be treated as institutional responsibilities embedded within governance, procurement, technology selection, instructional design, faculty development, and quality assurance processes. Institutions should establish mechanisms for continuous monitoring and remediation of digital accessibility barriers across learning environments and learner support systems (C-RAC, 2011; NCHEMS, 2021). Key aspects of such an effort include:

- Defined processes, accessible course design practices, and ongoing instructor development support compliance with legal requirements and promote inclusive teaching

9 Regular and substantive interaction (RSI) is defined in 34 CFR 600.2 “Distance education”, in items 4. (substantive interaction) and 5. (regular interaction) (Distance Education, 34 CFR 600.2., 2024)

- Collaboration among academic leaders, accessibility specialists, instructional designers, and instructors to proactively communicate available supports, reduce systemic barriers to access and engagement, and normalize the use of accommodations
- Continuous evaluation and incorporation of assistive technologies that offer more rapid, personalized support

Within this framework, instructional designers develop accommodation-ready course structures and provide targeted implementation support when individualized accommodations are required.

Digital Campus Infrastructure

Digital learning environments, such as a learning management system (LMS), must be accessible, reliable, usable, compliant, and leverage current technologies in unique learner-centered ways. It is not effective practice to try to replicate a face-to-face (F2F) learning environment in a digital setting. Instructional designers and instructors must employ evidence-based practices for digital learning that may differ from those in a traditional F2F classroom. For example, in-class discussions cannot be replicated in an asynchronous environment. If the learning goal is to get top-of-mind responses, online discussion threads may need to be designed differently than the traditional 'post and reply to two others' format.

> Learners persist when they feel connected, supported, and seen.

To better support interdisciplinary learning across programs, institutions should prioritize delivering digital course content through a unified learning management system, rather than maintaining multiple platforms administered separately by individual colleges, schools, or units. While some differentiation may be warranted—particularly to address distinct needs across credit and non-credit populations, institutional leaders should aim for LMS solutions that can serve the full spectrum of instructional offerings. This approach recognizes that learners increasingly move fluidly between degree and non-degree pathways and engage with programs across organizational boundaries, making consistency in the learning environment both a practical and strategic imperative.

Preparing Students

Admission to Matriculation

Engage prospects early during the recruitment process, as many cite response time as one of the critical factors in their decision to enroll at one institution over another (EducationDynamics, 2026; Jeffe, 2022). Foster a virtual student community that includes participants from a wide range of geographic locations and professional backgrounds. Encourage admitted students to enroll by offering a welcoming introduction to the institution and providing early support that helps them navigate the transition into the program and a new learning environment.

Orientation

Like new student orientations for on-campus students, online orientations help learners become familiar with the institution and successful practices in the online environment by providing an orientation customized to their needs. Orientations should include:

- Links to administrative and business offices like the bursar and registrar, with assurances that financial and administrative tasks, such as paying for courses, adding and dropping/withdrawing from courses, can be done online

- Links to webpages that contain deadlines and institutional policies on course and term add/drop/withdrawals, FERPA, grading, student conduct, academic integrity, and where to seek counsel for issues that might arise in their courses
- An overview of available student support services such as the library, help desk, program support staff, tutoring, writing support, and accessibility/disability services, along with whom to contact and what steps must be taken to receive accommodations
- Technology requirements, such as items the student must purchase and those the institution provides
- An overview of the learning management system and institutionally supported instructional technologies inclusive of anti-plagiarism software
- Clear designation of institutional policies versus instructor or course-level requirements and expectations. This may include missed participation/work, plagiarism, online etiquette, the instructor's use of artificial intelligence (AI), learner use of AI, and grading standards, and information on what to expect in course syllabi (e.g., course assignments, deadlines, rubrics, etc.). Fundamentally, it is important to distinguish between online students' orientation at the university and what it means to be an online student in a particular class. Thriving as an online student at an institution, with training that provides tips, tricks, and institutional policies, is different from course-specific requirements. Individual instructors should provide in their syllabi course-specific information on ways learners can successfully complete the course.

Technology

Provide initial set-up support as well as access to assistance with the learning management system and associated training tools during extended hours such as during the evening and weekend. Help with the LMS and associated learning tools, and any other issues that could impede a student's access to the virtual classroom or university services. Communicate where learners can receive support for third-party technology, such as textbook publisher tools and virtual labs.

Ongoing Support

Much like classrooms benefit from a flipped model, learning services can as well. In fact, most accreditors require institutions to demonstrate that learner support services are equitable to those provided to on-campus students. The accreditation process examines the access learners receive to library services, academic technologies, laboratories, discipline-specific resources, and digital learning materials necessary to achieve program outcomes regardless of location or modality. Institutions must regularly evaluate the adequacy, accessibility, and usability of these resources in support of learner success (C-RAC, 2011; NCHEMS, 2021).

Learner support that is student-centered, as opposed to process- or institution-centered, provides the optimal environment for success. Communication plans designed not to inundate busy adult learners with messages but rather to intentionally push information to them just in time ensure they know exactly what to do when they need to do it, and the resources available to help them throughout their journey (Grebing et al., 2018). Students need access to ongoing technical and administrative support, as well as to navigators or student success advisors who can help them navigate the institution's policies and procedures.

Virtual Community

Provide access to a virtual collaborative space for learners to meet both synchronously and asynchronously. These can be used for study groups, work groups, or general gatherings. Consider setting up common activities in each course where learners can gather online to "hang out" and discuss non-academic topics, such as changing careers. Encourage learners to build meaningful connections with one another by sharing potential points of connection, such as hometowns, interests, and employment, within privacy parameters.

Engage peer leaders in medium- and large-sized online programs to guide the communities and inform the content that may be shared.

Library

Communicate available services (e-journals, book borrowing, and reserves) and ensure students can access them at a distance, along with assistance from professionally trained library staff when needed. Where appropriate, provide access to discipline-specific librarians who are familiar with online learning and be able to point to supportive materials within the library infrastructure.

Bookstore/Resources

Facilitate easy access to printed or online course materials through an online fulfillment provider with extensive shipping or download capabilities. Textbook needs can be supported by the institution's bookstore, publisher websites, or by the plethora of web-based tools and services available. Avoid relying solely on publisher-created materials for online courses, as this may reduce opportunities to interact with learners on a meaningful basis. Instead, consider using Open Educational Resources (OERs) if possible.

Virtual Laboratory

Determine if virtual access to laboratory resources is required within and across coursework. Many expensive and difficult-to-install software programs can be hosted centrally by the institution or are available as cloud-based services.

Wraparound Support

Learners need support as they progress through their learning pathways. The following learner support services should be available to all learners, regardless of modality:

On-Demand Learning Modules

Provide learners with on-demand modules on key topics such as plagiarism, copyright protection, academic writing styles, citation rules, library support, AI use, and other topics that can be accessed as needed or scheduled at regular intervals. Additional modules on topics such as study techniques, time management, and mental wellness can also provide useful information to a variety of learners.

Advising and Academic Support

Academic advising. Create opportunities for learners to receive academic guidance on course selection, degree progression, academic progress, and career implications at consistent intervals. Provide online learners with more than sufficient opportunities to schedule appointments with their assigned advisor. Provide a web-based service that tracks learner progress through their programs and provides details on how their learning relates to the durable skills required in the workforce. Provide dedicated success coaching services by leveraging AI agents or advisement staff who will be responsible for tracking student progress and success through the program of study and who can intervene with support as needed.

Career advising. Provide access to online and face-to-face career services and describe how learners will be able to use the institution's career support office. Leverage learning outcomes by offering career advising, including e-portfolio building, job-search skills (such as identifying prospective employers and interviewing), preparation for career-change/promotion opportunities, and résumé and cover letter development.

Agentic AI. Emerging AI agents are increasingly capable of autonomously coordinating services, decision-making, and interactions traditionally managed by humans (Shahidi et al., 2025). Learner support is now at an inflection point in determining which services should remain uniquely human, and which can be augmented through AI agents. Most importantly, learners should retain control over their own pathways and remain actively involved in how AI supports their learning. Institutional leaders should thoughtfully deploy AI in ways that support active learning, improve efficiency, and allow human and financial resources to focus on work requiring human judgment and expertise. Clear pathways for human oversight of AI products, tools, and outputs should be established to ensure learner needs are met while protecting privacy, agency, and educational experiences (U.S. Department of Education, Office of Educational Technology, 2023).

Academic support. Ensure learners have access to tutoring and writing support in multiple modalities and at times convenient for those online. Determine if the institution's academic support center can provide these services to learners at a distance or whether external assistance will be needed. Likewise, map a process for learners to receive academic support from instructors, success coaches, and tutors when necessary. Ensure learners know whom to contact when they have a question and the expected response time.

Retention Practices with Comprehensive Learner Analytics

'Know thy online learners' should be the maxim for all learner retention efforts.

Comprehensive learner analytics. Deep partnership with the institutional research units is a must for elevated learner support strategies. Cultivate an ongoing and segmented analysis of learner profiles to include those non-persisting learners. Involve students' voice in the design of systems, strategies, and solutions. Develop a data catalog of all the reports and analysis of those reports and share the knowledge internally. Learning from one's own data can be a much more worthwhile endeavor than any conference or webinar they can attend. Plan to collect and analyze learner data and raise institutional capacity for that work each quarter, semester, or year.

Data-informed. Who is staying and completing their degree? Who is leaving before the course ends or after the term? What assumptions do the institution or department have about non-persisting students? Which learners are disadvantaged by the lack of data? Sophisticated learner support operations must include a data-informed strategy encompassing a persistence methodology that identifies variables that either increase or decrease the likelihood of persistence. For example, does completing a required "mission statement" (a way to quantify learner intent) indicate likelihood to persist? Time, effort, and attention are required to not only collect but also to analyze online learner data and uncover trends in their behaviors inside and outside the classroom.

Learning analytics. Develop robust student-tracking mechanisms using analytics from the LMS, CRM software, and student information systems (SIS). Consider using LMS and CRM analytics to identify those at-risk early, coupled with success-coaching outreach (Grajek & 2023–2024 EDUCAUSE Top 10 Panel, 2023; U.S. Department of Education, Office of Educational Technology, 2023).

Coordinated, strategic outreach. Use data-informed communications to proactively reach learners who have paused their pursuit of a credential and create outreach plans. Success coaches are integral to maintaining contact with learners with non-consecutive enrollments and can help learners identify opportunities to resume their studies. Students need to feel a continuous connection with the institution, and to know support is available as needed, but should not be inundated and overwhelmed with too much communication. Leaders must determine what is essential, what helps them continue their studies, what types of communications they are most likely to respond to, and why? Using the data approach described earlier to achieve a communications audit will ensure automated systems are not drowning learners with texts and emails, resulting in more intentional and just-in-time engagement.

Success coaching. A success coach can educate learners on navigating unknown and known barriers to their success and share the behaviors of those who have been successful, thereby democratizing heuristic knowledge. Getting learners to schedule and prepare for their advising appointment can be an important part of success coaches' work. This learner support strategy helps learners, especially those most likely not to persist, with the knowledge, skills, and milestones to achieve credential completion. Consider hiring students to serve as "peer" success coaches and using virtual communities to deploy the strategy. Institutional leaders may also want to consider a one-credit "learning how to learn" course or customized orientation for those who are returning to postsecondary education. It's another way, in addition to success coaching, to proactively help learners succeed.

Graduation or Program Completion

Commencement

While often reluctant to attend and sit with the 'traditional students' at commencement, online learners should be encouraged to attend graduation ceremonies. They should celebrate their accomplishment, especially in front of their families. The online enterprise should consider hosting a meet-and-greet event where learners can meet their advisors, program chair, instructors, and learner support team members. This cultivates successful learners as proud alumni and even grassroots recruiters to other potential online learners.

Tracking Post-Completion Outcomes

Postsecondary institutions are facing increasing calls for accountability to prove that a degree is worth the investment. Measuring post-completion success by comparing earnings to those typical of lower levels of educational attainment is an issue that draws support from both sides of the aisle. Both Republican and Democratic lawmakers have supported this proof in some form, most recently building it into federal financial aid requirements. Postsecondary leaders must consider, through the use of interoperable technologies and data standards, how outcomes data, beyond that which is self-reported by learners, can be compiled. In preparation for this evolution of postsecondary accountability, institutions should ensure that credentials, learning records, and program information are structured in ways that support verification, interoperability, machine readability, and discovery across emerging digital ecosystems. As learners increasingly interact with employers, credential registries, search platforms, and AI-enabled systems, discoverability and trust become strategic institutional assets and important measures of efficacy for stakeholders.

> Institutions should strive to make support services available wherever learners are—not wherever campus offices happen to be.

More information on interoperability and data standards can be found in the Technology Hallmark which follows.

Continued Engagement

Determine how learners can remain connected and engaged with the institution after program completion. Communication and outreach can foster a productive and engaged alumni base. Research indicates that graduates of online programs tend to make philanthropic contributions sooner after graduation, though typically in smaller amounts (Lescht, Schejbal, & Shiels, 2018; Jackson, 2023).

Online alumni should receive all university alumni communications, be incorporated in efforts to recognize their successes and milestones, solicited in fundraising efforts, supported in their career advancement, and encouraged to participate in future educational opportunities tailored to their career trajectory. Further, alumni correspondence should not rely on references to activities and traditions that are only campus-based (e.g., views from specific buildings, athletic events, parades, etc.) as they are not touchstones for online learners.

Who and How? Lifecycle Mapping

It is critical to map the learner lifecycle by identifying every potential interaction from initial interest through graduation—through a collaborative, coordinated process with representatives from multiple functional areas across the institution. Learner journey mapping has a higher level of efficacy when documented and understood at the program level, allowing institutions to acknowledge nuisances in online programs and account for supports unique to the program.

Once the learner lifecycle has been mapped, the next step is to identify every potential point of learner interaction with the institution. The goal is to ensure a coordinated, consistent communication effort at every step of the lifecycle. An owner for each touchpoint should be identified and assigned the task of creating detailed sub-processes to ensure a seamless workflow.

Once these touchpoints and interactions are identified, a primary point of contact should be designated for learners. This success coach can be a learner services staff member and/or an AI agent with an expert understanding of the program. The success coach supports learners through a concierge model. The goal is to avoid requiring learners to call multiple departments in the institution—a telltale sign of institutional disorganization. The modern education environment is just beginning to partner with AI technology to provide support services at-scale. AI agents may become a solution for larger institutions to manage advising and tutoring services to augment the opportunities that exist with success coaching.

A single point of contact does not independently fulfill online learner support needs. Learner success depends on a variety of interwoven units and processes. Learner support must become an ongoing focus across an institution and be the responsibility of every individual involved in learner experiences in any way, regardless of modality. It is critical that every office within the institution understands that all learners are important to the success of the institution.

Further, institutions must review traditional student fees, and bifurcate general fees that support on-campus student experiences (e.g., dorms, recreation facilities) from those that fund digital learning necessities (e.g., learning management systems, the institution's technological infrastructure for digital learning, remote proctoring, etc.). Allocating fees appropriate to the resources available or actual use by specific populations of learners is an important activity. This means a differentiated fee structure based on class or program versus merely basing the student fee amount on general enrollment at the university.

Embedding digital learning across the institution does not eliminate the need for a dedicated team accountable for the success of online learning. If online and digital learning aren't clearly owned by a specific team, they risk becoming everyone's responsibility—and ultimately no one's priority.

Key Performance Indicators

Institutions should define service-level expectations for advising, tutoring, technical support, accessibility accommodations, and learner communications, including response times and escalation procedures for online learners.

- **Learner-focused indicators**
  - Identify the desired percentage persistence rates for fully online learners, disaggregated by demographics (Tinto, 2016; Bettinger & Loeb, 2017). Consider exploring these factors:
    - First term to second term persistence (inclusive of year-over-year)
    - Graduation/completion rates
    - Common stop-out points in program curricula
    - Reengagement/reenrollment of stop-out learners
    - Persistence of reengaged/reenrolled stop-out learners
- Explore engagement patterns that indicate sustained engagement with learning materials and technologies. These analytics are captured and logged by the learning management system:
    - Log-in data
    - On-time submissions
    - Participation in course activities
  - Identify metrics for learner responsiveness
    - First call resolution
    - Call wait times
    - The frequency and busiest times for appointments with learners
  - Capture learner satisfaction by ensuring course and program evaluations include sufficient items to disaggregate data by learner characteristics, course modality, and faculty assignment (Eckerson, Rowe, McLeese, 2024). Likewise, alumni surveys can capture satisfaction with institutional learner support services that are not directly tied to program activities. The use of net promoter scores is strongly encouraged.
    - Learner satisfaction
    - Learner programmatic experiences
    - Centralized services such as advising, career counseling, disability services, tutoring, and writing support
  - Capture and analyze learners' self-reported assessment of goal setting and achievement, transfer of relevant skills across courses, and skill transfer to academic or professional environments. Consider the inclusion of longitudinal data items that explore job success, alumni achievement, fundraising opportunities, and potential referrals or corporate connections for new learners
- **Stakeholder-focused indicators**
  - Number of graduates hired by employers
  - Percentage increases in employer satisfaction with graduates employed by their organization, likely collected during program review and/or accreditation activities

- **Staff/faculty-focused indicators**
    - » Percentage increases in faculty and staff satisfaction data collected via program evaluation, likely in conjunction with program reviews and/or accreditation activities.
    - » Existence of feedback loops that provide opportunities for continuous improvement, learner-centric needs assessments, and both course and program design improvements
    - » Existence of a dissemination plan for the aforementioned KPIs, informing all of the progress the institution has made in online and digital instruction

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Hallmark 5: Technology and Digital Innovation

Hallmark Overview

Technology is no longer simply a tool that supports digital learning, but rather a strategic institutional capability. This hallmark focuses on the technology systems, policies, data practices, security measures, and operational decisions that support effective and scalable digital learning.

Major Themes

- Technology governance and stewardship
- Digital ecosystems and interoperability
- Cybersecurity, privacy, and risk management
- Artificial intelligence and emerging technologies
- Learning analytics and decision support
- Infrastructure and vendor management
- Innovation and institutional readiness

Connections to Other Hallmarks

This hallmark provides the technological foundation that enables instructional quality (Hallmark 3), learner success (Hallmark 4), strategic innovation (Hallmark 2), and organizational effectiveness (Hallmark 1). Technology decisions increasingly influence every dimension of institutional performance.

Most Relevant To

Chief information officers, chief technology officers, academic technology leaders, information security officers, enterprise systems leaders, data governance professionals, learning analytics teams, and COLOs

Readers interested in this hallmark may also wish to review: Hallmarks 1, 3, and 7.

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Hallmark Context

Digital learning depends on reliable and well-integrated technology systems. Institutional leaders should view technology not as a collection of individual tools, but as an interconnected set of services that supports teaching, learning, administration, and learner success. To drive broader digital transformation, institutions must build an infrastructure ecosystem made up of technology literacies, a suite of integrated technologies, and services that support a learner's seamless movement across multiple modalities that enables responsible AI and data practices, and meets the highest standards of security and accessibility (Sukharevsky et al., 2025). Effective use of technology requires clear leadership, sound policies, appropriate training, and ongoing support for faculty, staff, and learners. As artificial intelligence becomes increasingly embedded within institutional operations and learning environments, these same capabilities must be applied to AI. Institutions should establish clear goals, policies, support structures, and professional development opportunities related to AI. These practices should evolve as technologies, regulations, and institutional needs change.

> Technology is no longer simply a tool. It is a strategic capability that shapes the learner experience and institutional effectiveness.

Institutional AI strategies should address issues such as transparency, accessibility, privacy, academic integrity, and human oversight. Institutions should also establish processes for evaluating AI-related procurement decisions and ensuring compliance with applicable laws and regulations. Institutions should establish clear policies regarding acceptable uses of AI by students, faculty, staff, and third-party vendors, including processes for continuous review as technologies evolve.

Institutions should maintain secure, transparent, and privacy-conscious processes for verifying learner identity across digital learning environments. Authentication practices should be proportionate to academic, regulatory, and licensure requirements while balancing accessibility, usability, student privacy, and cost burden. Policies governing identity verification technologies, remote proctoring, biometric systems, and AI-enabled authentication tools should be clearly communicated and regularly reviewed to ensure compliance with institutional standards, consumer protection obligations, and evolving regulatory expectations (C-RAC, 2011; NCHEMS, 2021).

This hallmark emphasizes that technology decisions should support institutional goals and the effective delivery of digital learning rather than focus solely on individual products or platforms. Technology can help institutions create learning experiences that are more flexible, interactive, and accessible. When used intentionally, technology supports effective teaching practices, expands access to learning, and allows institutions to serve learners in multiple locations and formats. New tools may also support greater personalization, provided their use remains grounded in sound pedagogy and institutional goals. The intentional use of educational technology should expand access in ways that reduce—rather than exacerbate—opportunity gaps among learner populations. Ongoing professional development for instructors centered on pedagogically sound application of technology is critical.

Key Elements

- **Accessibility.** Accessibility should be a requirement for technologies and digital content across the institution. Implementing systems and support to ensure digital accessibility in the technology infrastructure must be a leadership priority to increase access to higher education. To address accessibility proactively, leaders should implement purchasing and contract renewal processes that ensure the digital accessibility of technologies. These processes should also review whether the features of the technology under consideration will duplicate current functionality in the technology ecosystem, allowing institutions to better leverage tight budgets. In addition to saving money, reducing redundant features in the technology ecosystem also improves usability for learners and instructors
- **Cybersecurity and privacy.** Moving beyond mere regulatory compliance, institutions must establish transparent learner data practices that build trust with stakeholders. Further, higher education leaders must elevate cybersecurity from a technical operational task to a core institutional competency and strategic leadership priority, mirroring the EDUCAUSE Top 10 IT Issues (Grajek & 2023–2024 EDUCAUSE Top 10 Panel, 2023). Given the rise of agentic browsers, which can act autonomously and actively participate in learning environments on behalf of users, institutions may also need to revisit authentication standards, identity management practices, and protections against credential misuse (Shahidi et al. 2025).
- **Student identity verification and authentication.** In keeping with accreditation standards, institutions must maintain secure, transparent, and privacy-conscious processes for verifying learner identity across digital learning environments. Authentication practices are proportionate to academic and regulatory requirements, clearly communicated to students, and regularly evaluated for effectiveness, accessibility, data privacy, and cost burden. Institutions establish policies governing identity verification technologies, proctoring solutions, biometric tools, and emerging AI-enabled authentication systems consistent with academic integrity, consumer protection, and student rights obligations.
- **Sustainable technology stack.** As digital footprints grow, institutions must evaluate the sustainability of their infrastructure. This includes consideration of both environmental and financial sustainability (cloud vs. on-premises, total cost of ownership, etc.) as well as acknowledging the energy demands of large-scale computing and AI. Additionally, leaders must hold technology vendors accountable to institutional sustainability goals.
- **Learning management.** The learning management system (LMS) has served as the foundational infrastructure through which institutions deliver learning experiences. While LMS platforms remain central to institutional digital ecosystems, many have not evolved at the same pace as broader community-driven and AI-enabled learning environments. Institutional leaders should begin designing a future learning ecosystem in which agentic AI tools increasingly participate in the learning process alongside students, faculty, and support staff. Institutional strategy must move beyond platform administration and instead align digital learning ecosystems with the Scholarship of Teaching and Learning (SoTL), evidence-based pedagogy, learner success, and institutional mission. Postsecondary leaders should actively shape the next generation of learning environments by partnering with vendors, informing product development through institutional expertise, and co-creating interoperable, learner-centered systems that reflect the values, governance expectations, and educational priorities of higher education.

- **Interoperability and data standards.**[10] To move from siloed data systems to actionable intelligence, institutional leaders must consider how systems connect. Learning Management System (LMS), Student Information System (SIS), Customer Relationship Management (CRM), and analytics tools can present a more holistic view of learners using open standards and APIs. This global, real-time view of the learner enables proactive and timely intervention and personalized support. While benefits to learners may be realized with greater access to integrated data systems, postsecondary institutions are being held increasingly accountable for learner outcomes that can only be measured outside institutional data systems (e.g., wages, employment records, etc.). Interoperability and data standards enable opportunities for institutions to create comprehensive learner records (CLRs), which can contribute to learning and employment records (LERs). As credential wallets and LERs gain popularity, institutional data must work within the larger learn and work ecosystem.
- **LMS integrations.** LMS integrations are key to developing the next generation learning ecosystem, yet higher education institutions are often caught in a bind between what is considered enterprise technology services and what is considered experimental. Enabling more third-party tools that support learners without overcomplicating a technology portfolio requires balancing the benefits and disadvantages of technologies used at institutions. This is especially true for new generative AI study tools that will become invaluable to learners over time. Institutions need to decrease the time to deliver on testing and adopting new learning tools that maintain data governance, security, and privacy for learners.
- **Leverage for continuity of course delivery.** Embed online and hybrid capacity into institutional continuity plans, drawing on lessons from the COVID-19 era about rapid pivots and adaptive leadership (Hadley, 2023). Multi-model learning can also be used during weather or other institutional-related incidents.
- **AI and automation.** Institutions need to build AI strategic frameworks that include governance that proactively addresses pedagogy, learner support, and administrative uses (e.g., chatbots, predictive models) and are cross-functional among institutional systems; AI enablement that provides access and understanding to the use of teaching, learning, and administrative AI tools; and AI fluency for faculty, staff, and students who should understand both the use of AI as a technology, as a tool, and as a strategic focus. The 2025 EDUCAUSE Horizon Report, the U.S. Employment and Training Administration's AI Literacy Framework (2026), and the U.S. Department of Education AI Report addresses these issues while also mitigating algorithmic bias and prioritizing AI literacy, moving towards AI fluency for both faculty and students (Robert, 2025; U.S. Department of Education, Office of Educational Technology, 2023; Employment and Training Administration, 2026).

Why? Institutional Infrastructure

Technology platforms connect learners, instructors, content, and institutions across all modalities of education. A strong strategic approach to technology systems within the university is critical to future operations. This support infrastructure becomes the environment through which educational interactions and communications are managed. As with every other aspect of how business is conducted at world-class higher education institutions, the purposeful selection, application, and support of technology must be carefully managed and thoughtfully and completely implemented to drive learner-centered concepts and pedagogies, rather than being driven by procurement, budget, or the technology itself.

10 1EdTech Consortium defines interoperability as the ability of systems and applications to work together, exchange data, and use the information that has been exchanged. This concept is operationalized through widely adopted standards such as Learning Tools Interoperability (LTI), which enables secure, standards-based integration of applications with learning platforms (1EdTech Consortium, n.d.)

What? Interoperable and Integrated

The set of technologies required to implement, manage, and conduct digital education is vast. However, these tools cannot operate in silos; they must be seamlessly integrated and interoperable to provide a cohesive experience. Software and platforms will enable the following non-exhaustive list of functional areas across the institutional ecosystem:

- Prospect Management, Student Lifecycle & Enrollment
    - » Marketing, advertising, and admissions
    - » Financial aid and registration
    - » Orientation and enrollment management
    - » Alumni interaction
- Academic Delivery & Support
    - » Course delivery, rosters, and lookup
    - » Assessment, testing, and proctoring
    - » Mentoring, advising, and remediation
    - » Participant interaction and student engagement
    - » Co-curricular support systems
- Institutional Operations:
    - » Program process and management
    - » ADA compliance and accessibility
    - » Finance and Human Resources

To develop the mature, integrated systems that support these areas, institutions rely on a layered stack of educational technologies, including

- Core Infrastructure & Security
    - » Cloud-based systems, servers, and IT networks
    - » Database management and security systems
    - » Identity and authentication systems
- Learning & Engagement Platforms
    - » Learning management systems and mobile apps
    - » Adaptive learning platforms and web conferencing
    - » Proctoring and testing systems
    - » Learner portfolio and badging systems
- Content Creation, AI, & Accessibility
    - » Video/audio production tools, television studios, and classrooms
    - » Graphics development and animation systems
    - » Web development tools
    - » AI-supported course design assistants
- Captioning and accessibility tools

Driven by Pedagogy and Learner Experience

Technology alone is not education or pedagogy. Tools and systems become meaningful learning environments only when they are intentionally and strategically integrated. This requires technology decisions to be guided by individuals who understand the institution's identity, its strategic placement, and its pedagogical goals. Tools should be selected, developed, and supported by those who can align them with instructional strategies and priorities and deliver a cohesive, high-quality learner experience.

While frameworks for best practices are helpful, there is no single recipe for the appropriate combination of tools and technologies ideal for every application. The prescription does not begin with technology; it begins with thoughtful consideration of how educational goals and desired learning outcomes can best be achieved.

Who and How? System Integration

Designing, developing, and maintaining the technology strategy and infrastructure for digital learning operations generally involves a wide range of roles across the institution and, better yet, a unified campus effort. Critical technical knowledge from a range of areas, such as admissions, registration, enterprise technology, library, student engagement, marketing, financial aid, and similar offices, including alumni offices, must be woven into the institutional infrastructure strategic approach. In fact, there are very few mission-critical areas of the institution not involved in the design, development, operation, and maintenance of digital education systems. Consequently, key leaders from online education, academic affairs, information technology, administration and finance must collaboratively build strategic approaches that will guide discussions on learner engagement and support, system reliability, system security, scalability, academic and pedagogical quality, data governance and privacy and technology adoption.

Institutional leaders should establish formal data governance frameworks that address student privacy, cybersecurity, data retention, vendor data-sharing practices, AI governance, and compliance with applicable federal, state, and international privacy regulations including Family Educational Rights and Privacy Act (FERPA), General Data Protection Regulation (GDPR), Personal Information Protection Law of the People's Republic of China (PIPL) and state consumer privacy laws.[11, 12, 13] Likewise, institutions should establish ethical frameworks governing the use of learner analytics, predictive modeling, and AI-enabled decision systems. These frameworks should address transparency, informed use of learner data, bias mitigation, human oversight, data minimization, and appropriate intervention practices that support learner success while preserving trust and autonomy.

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11 Family Educational Rights and Privacy Act (FERPA): FERPA is a United States federal law that protects the privacy of student education records and grants students specific rights regarding access to and control over their information. Institutions receiving funding from the U.S. Department of Education must safeguard personally identifiable student information, provide eligible students the right to inspect and request amendment of their records, and generally obtain written consent before disclosing educational records, except under specific authorized circumstances. FERPA applies to records maintained in all instructional modalities, including digital and online learning environments, and requires institutions to establish clear policies and practices for student data privacy and security.

12 General Data Protection Regulation (GDPR): The GDPR is a European Union regulation governing the collection, processing, storage, and transfer of personal data for individuals within the EU and European Economic Area. Effective since 2018, it establishes principles of transparency, lawful processing, data minimization, security, and individual rights—including rights to access, correct, delete, and restrict use of personal data. Organizations that enroll, support, or engage learners residing in the EU must ensure compliance with GDPR requirements related to privacy, consent, data protection, and breach notification, regardless of where the institution itself is located.

13 Personal Information Protection Law (PIPL): China's Personal Information Protection Law (PIPL), effective in 2021, establishes a comprehensive legal framework governing the collection, use, processing, storage, and transfer of personal information within the People's Republic of China. PIPL emphasizes lawful, transparent, and purpose-specific data practices; requires informed consent for most data processing activities; and grants individuals rights related to access, correction, deletion, and restriction of their personal information. Organizations handling the personal information of individuals in China—including educational institutions offering digital or online learning experiences—must implement appropriate data security measures, minimize unnecessary data collection, and comply with restrictions on cross-border data transfers and automated decision-making.

The enduring message across several of these hallmarks is that digital technology is no longer a peripheral activity but a core institutional strategy. The success of technology-enhanced learning hinges on two interconnected pillars: intentional internal alignment and a responsive, market-driven approach that support the enterprise-wide architecture.

The COLO's Role in Shepherding Technology

The formalization of the Chief Online Learning Officer (COLO), discussed at length in the Professionalism Hallmark, plays a critical role in both institutional strategy and transforming online learning from a siloed unit into a core, mission-aligned function.[14] The COLO, or equivalent senior leader, serves as the central hub for building durable, cross-institutional coalitions that integrate digital initiatives across all major functional areas.

The COLO's essential role in a successful digital technology strategy bridges the gap between academic mission, pedagogical need, and technological execution. Specifically, the COLO is responsible for:

- Determining the learning challenges and how they can best be met through a technological solution
- Guiding technological investments and environments, in partnership with the Chief Information Officer (CIO)
- Driving data and AI governance by integrating these topics into senior leadership discussions; working with institutional research, IT, and legal counsel to establish clear standards, definitions, and governance for learning analytics and AI tools; balancing innovation with critical concerns around privacy and equity
- Ensuring institutional resilience by championing the embedding of online and hybrid capacity into institutional continuity plans to build crisis-readiness and adaptive leadership, drawing on lessons learned from rapid pivots in emergency situations

The COLO's leadership must align directly with the institution's strategic initiatives, ensuring that academic technologies advance key goals like enrollment growth, student retention, completion rates, institutional assessment, regulatory compliance, and new program development. This requires a strong partnership with other senior leaders, such as the chief academic officer/provost, chief information officer, and president's cabinet. Institutional leaders should ensure that analytics and AI systems are implemented transparently and with clear protections for student privacy, informed consent where appropriate, data minimization, and responsible governance.

Pedagogical Foundation, Planning, and Design

Effective instructional processes and activities require deep collaboration among program planners, instructors, instructional designers, and technologists. Their work is grounded in theories of education that utilize technology to ensure effective content delivery and the cultivation of critical thinking and problem-solving skills among learners. Before selecting technology, teams must thoroughly review instructional goals and identify enterprise needs that include the optimal tools to meet specific outcomes. Additionally, institutions should institute standards for best practices in digital learning and teaching design. These standards help create a common way of approaching learning design.

14 The growing strategic responsibilities of digital learning leaders parallel aspects of the historical evolution of the Chief Information Officer role from operational technology management to enterprise strategy and institutional transformation. See Widmer & Cavanagh (2025), Chapter 7.

The following questions should be considered:

- **Instructional modality.** Will lectures be synchronous, asynchronous, or a combination?
- **Standardization.** Are the tools standardized enough to support scalability, continuity, and consistent learner experiences?
- **Resource accessibility.** Where are learners located across time zones and geographic contexts, and what level of access do they have to reliable technology, including high-speed internet and timely availability of course resources throughout the day?
- **Interaction dynamics.** What forms of engagement will be used—such as asynchronous discussions, collaborative activities, messaging, audio/video interactions, or live sessions—and how will instructors guide and facilitate these interactions?
- **Assessment strategy.** How will learning be measured, and is proctored testing required?
- **Learner data.** How will learner data be generated within a course or program integrated with institutional reporting and analytics systems?
- **Accessibility by design.** How will accessibility be embedded in course design from the outset, rather than addressed as post-production remediation?
- **Incorporation of AI-enabled features**. How will learners' use align with institutional policies, data governance standards, and pedagogical objectives? Are instructors and learners able to function with basic AI literacy?

High-quality educational environments start with a clear understanding of pedagogical objectives, not software features.

State Authorization and Professional Licensure Compliance

Institutions engaged in distance, online, hybrid, or multi-state education should leverage technology to maintain comprehensive processes for compliance with federal distance education regulations, state authorization requirements, reciprocity agreements, professional licensure disclosures, and related consumer protection obligations.

Institutions should identify systems of record and establish documented procedures for:

- Monitoring changes in state and federal regulations
- Evaluating program alignment with state licensure requirements
- Coordinating institutional disclosures and notifications
- Managing student location data
- Reviewing curriculum changes affecting licensure determinations
- Overseeing clinical and experiential learning placements
- Maintaining records supporting institutional compliance determinations

Institutions should recognize that professional licensure determinations often involve risk-based institutional interpretation in the absence of formal state-board validation processes. They should therefore establish governance structures that include academic leadership, legal counsel, compliance personnel, information technology, and relevant academic programs in institutional decision-making (Kerensky & Cheverton, 2026; Carroll, et al., 2023).

Design and Development

Once pedagogical goals are established, IT professionals must be consulted to seamlessly leverage the learning management system and existing technology ecosystem to achieve programmatic and institutional goals. Video and audio interactivity should be available for live instruction and group work. Most web conferencing software providers integrate with learning management systems.

The goal is to support the entire learner lifecycle—from prospect to alumnus—within a cohesive environment. Whether for course registration, advising, live web-conferencing, or career management, the toolset must be familiar, highly navigable, and seamlessly integrated. Building this comprehensive solution requires ongoing consultation with academic, technical, and administrative branches to ensure the system serves all users effectively.

> The goal is not to adopt every new technology. The goal is to evaluate, govern, and deploy innovation responsibly.

Representatives from nearly every unit within a campus operation must be consulted and involved in the planning, including subject-matter experts, pedagogy and teaching experts, instructional designers, information technologists, programmers, graphic artists, authorities from admissions, prospective and enrolled learners, advisors, marketers, database administrators, library technologists, registrars, and finance, among other talented professionals.

System Architecture

Equally important to a well-designed hardware and software system is the selection of features that serve today's needs as well as anticipating the scale of tomorrow. For public institutions that are required to accept the lowest bid for technology acquisitions, it is important that a comprehensive list of system requirements is identified and articulated in the request for proposals (RFP) and requests for information (RFI). The RFP should balance clearly defined minimum qualifications and key solution features with the relative weight given to price. Therefore, coordinated planning for all RFPs is critical to ensure the solution meets the institution's needs now and into the future. Those charged with the development of online education systems must be careful and selective and consider the following factors.

Institutions should seek solutions that support recognized standards for digital credentials, learning records, identity verification, trust frameworks, and data exchange to facilitate portability, verification, and long-term usability across educational and workforce ecosystems (1EdTech Consortium, 2026a; 1EdTech Consortium, 2026b).[15] Further, institutions should evaluate not only institutional costs but also the cumulative financial burden technology decisions place on learners. Technology ecosystems should be designed to minimize unnecessary learner expenses associated with third-party platforms, digital content, software subscriptions, proctoring services, credentialing systems, and other technology-dependent learning requirements. Affordability should be considered alongside functionality, security, accessibility, and educational value when evaluating technology investments.

15 Emerging digital credential ecosystems increasingly rely on interoperable standards that support credential issuance, identity assurance, exchange, verification, and long-term portability across educational and workforce systems. Examples include Open Badges and Comprehensive Learner Records (CLR) and related standards developed to support trusted, learner-centered credential exchange (1EdTech, n.d.).

Accessibility

All digital experiences designed and developed as part of the online educational environment must be universally accessible to all learners. Vendors should be expected to include their self-attested compliance with accessibility standards, often represented on a Voluntary Product Accessibility Template (VPAT) or an Accessibility Conformance Report (ACR). In addition to vendor self-attestations (VPAT/ACR), institutions may also consider establishing internal accessibility review processes or periodic validation audits to ensure ongoing compliance as systems evolve.

All technology vendors serving U.S. postsecondary institutions should expect to comply with Web Content Accessibility Guidelines (WCAG), preferably at the highest level of conformance, as well as Section 508 of the Rehabilitation Act (29 U.S.C. 794d) (World Wide Web Consortium, n.d.; U.S. General Services Administration, n.d.). However, many vendors will not provide this information unless requested. Higher education leaders must ask for these disclosures.

Interoperability

Components of a digital ecosystem should be interoperable, meaning they are standards-based and work together seamlessly, not stapled together to sit side-by-side. When systems lack integration, they create data silos, frustrating user experiences, and creating administrative bottlenecks. By prioritizing data exchange across the SIS, LMS, and student-support platforms, institutions can replace fragmented tools with a unified architecture. This interconnectedness is essential for generating a holistic, 360-degree view of the learner and driving proactive learner success initiatives.

Scalability

System scalability must be a fundamental consideration in every stage of planning—not just with system servers, licenses, and bandwidth, but with the human element as well. From the technology to the people involved, it needs to be planned out in advance and designed around scalability. Technology vendors have different licensing schemas for their products, especially in Software as a Service (SaaS) environments. These can include payments determined by total institutional headcount (regardless of users), total users, instances of use, and flat fees.

> Digital ecosystems should feel seamless to learners, even when they are powered by complex institutional systems.

Many institutional leaders found themselves adding 'seats' to existing technology contracts when their entire institution migrated to remote instruction during the early days of the COVID-19 pandemic. Institutions must secure contracts that easily expand to support accommodating both positive developments (a successful launch of a new program) and negative developments (sudden shifts in academic operations), preparing for worst-case scenarios based on lessons learned during the COVID-19 pandemic. In essence, an institution's digital architecture is the backbone of its academic continuity plan.

Redundancy

Because every electronic component is subject to failure, system infrastructures should feature redundancy in system architecture and engineering. It is necessary to rely on redundant components with automatic failover hardware and software switching to ensure that operational interruptions are avoided and minimized. For cloud-based systems, inquiring about 'up time' and redundancies will be important to determine if a vendor has the capacity necessary to meet demand, as well as adequate resources in the event of system failures. Institutions should also ensure that coordinated communication processes are in place to inform learners and faculty during system disruptions.

Many software companies rely on major companies for their cloud-based services, such as Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform (GCP). When these companies have a service interruption, it can impact pockets, or the entirety of an institution, depending on the technology deployed. Further, these interruptions may impact an institution's ability to notify users of outages. Institutional leaders must know and understand the implications of cloud-based service outages, have an inventory of the cloud-based services used in the institution's technology stack, and collaborate with their technology vendors on contingency plans.

Postsecondary institutions cannot suffer significant interruptions to campus building power, network connectivity, lighting, or climate control. Digital learning systems and platforms should be added to the list of 'always-on' institutional technologies.

System Security

Information assurance is mission critical. Institutions must protect against a range of risks—from denial-of-service attacks that disrupt operations to unauthorized access or breaches involving sensitive learner data. As heavy users of IT infrastructure and networks, colleges and universities face persistent security challenges that can lead to downtime or the exposure of confidential information. While the cost of maintaining secure systems continues to rise, robust information assurance remains essential to institutional operations and trust.

Technical Support

Data-driven, technical support must be tightly integrated into the learning environment. Support staff must have access to live system dashboards and course access to assist learners efficiently.

With constant internet connectivity and nearly universal smartphone usage, the general populace expects immediate access to information and support through real-time chat, texting, and messaging tools. Limiting help desk hours, especially when offering asynchronous programs catering to learners across wide geographical areas, requires a more substantial investment in technology support. The long-felt gold standard for technical support has been 24 hours per day, seven days per week, and yet many institutions, by observing system usage and course deadlines, can anticipate user needs and achieve adequate support without 24/7 help desk availability. This applies to institutions with budgetary constraints, and smart deployment of resources and informing instructors when technical support is available is key and can then be considered when setting course deadlines.

Technical support staff must be highly trained and tightly integrated into the operational aspects of institutional technology platforms. Excellent technical support systems are data-driven, and support experts must have access to information necessary to assist an individual learner in need, for instance, a course listing for that individual and access to those courses in order to investigate user issues.

Technical support services should be integrated into the digital learning environment so that help is easily found and accessible wherever the participant may be in the environment. Self-help support services such as FAQs and contact information must be well-organized and organic. Likewise, chat agents (both human and AI) have become a useful resource to address this just-in-time need within digital environments. Through the use of AI, institutions can offer opportunities to provide personalized learning support and guidance for academic challenges, student progress, and persistence. Tools can be procured or created to use data from the LMS to identify at-risk students, support outreach mechanisms, and help learners overcome challenges. Support staff and resources must be scaled appropriately for the number of participants and the type of systems being utilized.

Training

Even the most intuitive systems require comprehensive training for instructors and learners. Training should encompass not only tool functionality, but also responsible and effective use, particularly AI features embedded across platforms.

To ensure optimal training is available for users, a well-resourced team of trainers who are themselves constantly engaged in their own ongoing education must be prominent in the enterprise. Institutional leaders should strive for a culture that embraces ongoing learning by all employees of the institution around technology topics for operations, business, teaching, and learning.

The digital landscape is continuously shifting. Therefore, institutions must deploy dedicated training teams and remain software-agnostic, focusing on the objective rather than the tool, allowing for fluid transitions as new technologies emerge.

Continuous Improvement—Looking Forward

Education today is supported by a digital ecosystem (regardless of modality) that provides participants with instantaneous, reliable, high-quality opportunities for immersive interaction; content development and collaboration; information display and sharing; and communications. Collectively, the academic community must always look forward, leveraging new tools such as artificial intelligence and agentic AI systems to create new learning opportunities, forge new pedagogical paradigms, reduce and/or remove barriers to content design and delivery, and augment the human experience.

To ensure these systems do not stagnate, leaders must institutionalize continuous improvement. This internal review process should include routinely conducting focus groups and soliciting evaluations from participants. It should be coupled with external engagement, including technology-focused communities, especially those beyond higher education, to stay abreast of both current possibilities and the next generation of improvements.

Furthermore, accreditors consistently expect evidence that online and onsite learning achieve comparable outcomes. Institutions offering programs across multiple instructional modalities must establish processes to evaluate the comparability of learning outcomes, academic rigor, student achievement, and credential integrity. Assessment systems should incorporate direct and indirect evidence of student learning and inform continuous improvement at the course, program, and enterprise levels (C-RAC, 2011; NCHEMS, 2021).

Key Performance Indicators

Strategic and Compliance Metrics

- **Establish an enterprise-wide digital technology strategy.** A well-defined strategy ensures alignment with institutional mission and vision. (Casiello, A. 2024).
- **Establish, document and review of governance documents.** Review data governance, AI, and IT policies annually (Grajek et al., 2024; Robert & Reinitz, 2023; U.S. Department of Education, Office of Educational Technology, 2023).
- **Implement and monitor ongoing security trainings.** Frequency and outcomes of regular third-party security assessments, penetration tests, and faculty/staff phishing simulations
- **Conduct biannual accessibility audits.** Regular accessibility audit results improving over time (i.e., proportion of courses meeting institutional or external accessibility standards) (CAST, n.d.)

- **Assess and optimize technology.** Knowledge of utilization rates of vendor contracts and tracking of the financial and environmental costs of the technology stack
- **Ensure interoperability and open standards for integrations adherence.** Annual audits of technology tool integrations to ensure security data privacy, and accessibility compliance. Existence of learning technologies interoperability (LTI) language in RFI and RFPs (1EdTech, n.d.)

Infrastructure Metrics

System Reliability and Performance

- **Monitor system availability and recovery metrics.** Track system uptime (target ≥99.9%), mean time to recovery (MTTR), and incident frequency to ensure consistent service delivery
- **Analyze peak usage and performance trends.** Measure system latency, load times, and performance during peak vs. off-peak periods to inform capacity planning

User Access and Engagement Metrics

- Track user access and adoption rates. Monitor the percentage of active users accessing core systems weekly, including peak usage times and concurrent user loads
- **Evaluate usage of core services and resources.** Analyze page views, unique visits, and top-accessed tools/services to identify high-demand areas and gaps in support

Technical Support and Service Effectiveness

- **Measure help desk responsiveness and resolution efficiency.** Track average first-response time, time-to-resolution, ticket volume by category, and first-contact resolution rates
- **Assess user satisfaction with support.** Conduct regular customer satisfaction (CSAT) or net promoter score (NPS) surveys to evaluate instructor and learner satisfaction with technical support services

Infrastructure and System Utilization

- **Monitor infrastructure performance and capacity.** Track server response times, CPU and memory utilization, network bandwidth usage, and authentication success/failure rates
- **Evaluate LMS and learning tool engagement.** Measure login frequency, session duration, tool usage rates, and completion of key learning activities within the LMS

External Systems and Vendor Performance

- **Review vendor SLA compliance and system reliability.** Monitor uptime, latency, and performance metrics of cloud-based and third-party systems against contractual service level agreements (SLAs)
- **Assess integration performance and stability.** Track API response times, error rates, and system interoperability across integrated platforms

Instructor and Learner Metrics

Enrollment and Academic Metrics

- **Track enrollment and registration effectiveness.** Monitor registration completion rates, course fill rates, and enrollment yield across programs and modalities
- **Evaluate instructor and learner satisfaction.** Conduct routine surveys measuring satisfaction with digital learning environments and analyzing trends over time
- **Monitor instructor readiness and engagement.** Track participation in training programs and subsequent adoption of instructional technologies and pedagogical practices
- **Measure course and program development timelines.** Track time-to-launch for new or revised courses/programs and the volume of updates per academic cycle

Technological, Pedagogical, and Instructional Mapping

- **Assess alignment between technology use and student outcomes.** Correlate LMS engagement metrics (e.g., logins, submissions, discussions) with course completion, retention, and success rates
- **Develop and maintain a comprehensive learning technology map.** Document where teaching and learning occur across systems, ensuring alignment with learner pathways and personas
- **Conduct regular gap analyses of learner pathways.** Identify and address gaps in the digital ecosystem, tracking resolution timelines and impact on learner experience

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Hallmark 6: External Advocacy and Leadership Beyond the Institution

Hallmark Overview

Digital learning enterprises operate within a broader network of employers, workforce organizations, policymakers, accreditors, professional associations, and community partners.. This hallmark focuses on how institutions build productive relationships with external partners to improve learner outcomes, strengthen workforce alignment, inform policy discussions, and advance institutional goals.

Major Themes

- External advocacy and field leadership
- Workforce and employer engagement
- Partnership development and collaboration
- Public policy and regulatory engagement
- Credential portability and learner mobility
- Community and economic development
- Institutional reputation and influence

Connections to Other Hallmarks

This hallmark focuses on how institutional leadership extends beyond campus through partnerships, advocacy, and engagement with external organizations. It strengthens the workforce alignment efforts of Hallmark 2, supports learner outcomes described in Hallmark 4, and reinforces the profession-wide leadership expectations found in Hallmark 7.

Most Relevant To

Presidents, provosts, COLOs, government relations professionals, workforce development leaders, corporate partnership teams, continuing and professional education leaders, community engagement professionals, and industry relations leaders

Readers interested in this hallmark may also wish to review: Hallmarks 1, 2, and 7.

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Hallmark Context

It is critical to create a singular, transparent lens through which external constituencies view the quality, substance, and application of services provided by the online enterprise(s) of institutions. External leadership now includes active engagement with policy and compliance networks such as the U.S. Department of Education, National Council for State Authorization Reciprocity Agreements (NC-SARA), State oversight and licensure boards, and accreditors, as well as legislators, workforce development boards, and employers. External advocacy is not a communication function. It is a strategic leadership responsibility that shapes how regulators, accreditors, policymakers, and the public interpret the legitimacy, quality, and value of an institution. The online enterprise often leads this charge.

Online and digital leaders must be deeply fluent in the regulatory and definitional landscape that governs distance education as defined by a multitude of authorities. Their frameworks and guidelines directly shape program design, delivery, and institutional risk. New frameworks and regulatory functions continue to be part of the landscape. The Distance Education and Innovation final regulations (2020) clarified critical distinctions such as distance education, regular and substantive interaction (RSI), and competency-based education, reinforcing that federal financial aid eligibility hinges on demonstrable instructional engagement. These definitions have been codified in Distance Education, 34 CFR 600.2. (2024) These definitions are not merely technical. They determine whether a course is classified as distance education or correspondence, a distinction with significant implications for Title IV eligibility and audit exposure.

> External advocacy is not a communications function—it is a leadership responsibility.

At the same time, institutional reporting frameworks such as IPEDS, accreditor interpretations (e.g., Higher Learning Commission), and federal agencies, including Veterans Affairs and the Department of Homeland Security, apply overlapping but distinct definitions, requiring leaders to navigate inconsistencies across compliance, reporting, and student eligibility requirements. This complexity is further compounded by state authorization requirements and participation in reciprocity agreements such as SARA, where evolving debates around consumer protection and state oversight continue to challenge the balance between access and regulation (WICHE Cooperative for Educational Technologies (WCET) State Authorization Network, n.d.). Yet with this legal and regulatory complexity, the legal and government affairs teams at many institutions defer to the knowledge and discernment of chief online learning officers to navigate this environment on behalf of the entire institution. This can sometimes result in a unit with limited resources bearing the responsibility for compliance work that puts institution-wide operations at risk, such as federal financial aid.

Effective leaders must therefore move beyond surface-level understanding and operationalize definitions into clear institutional policies, instructor expectations, and course design standards that ensure both compliance and high-quality learning experiences. Policy and regulatory literacy are not optional for online and digital learning leaders. It is a core professional competency.[16] Without it, institutions risk external sources of funding, misapplied policies, uninformed decisions, and missed opportunities to advocate effectively for their programs and learners. Online enterprise leaders must develop and support an ecosystem strategy to shape the story that is communicated to all external constituents including legislative decision-makers and the public through interaction with media outlets.

16 In 2020, UPCEA defined the competencies and attributes of professional, continuing, and online practitioners. “Understands the laws, regulations, policies, governance, and institutional contexts relevant to the PCO enterprise” addresses the concepts in this hallmark. https://upcea.edu/competency-and-attribute-statements-for-professional-continuing-and-online-practitioners/ (UPCEA, 2020)

Close partnerships with the institution's general counsel, government relations officers, corporate education and outreach leaders, and leaders of alumni associations are key relationships to form and nurture, as no single office or leader at an institution can navigate the complexity of the external policy and advocacy landscape. It is critical that online leaders ensure efforts in all of these areas and consider all learners who are engaged in multimodal learning.

Evolving program rules continue to create the necessity for institutional leaders to be engaged at every level of compliance to ensure institutional effectiveness in the age of increasing regulatory control. Consistent with accreditation standards, digital learning programs must participate in systematic review cycles that incorporate internal and external perspectives, analysis of student achievement and engagement data, learner feedback, workforce outcomes where appropriate, and evidence of academic quality. Institutional leaders need to document resulting improvements and demonstrate how findings inform planning, resource allocation, curriculum redesign, and learner support strategies (C-RAC, 2011; NCHEMS, 2021).

Further, lessons learned from the COVID-19 pandemic suggest regular and consistent communications focused on the quality of intentionally designed online learning are necessary. Differentiating current practices supporting purposely designed online and digital learning from 2020's hastily assembled remote instruction will help an institution's stakeholders understand the role of digital and online learning at an institution (Hodges et al., 2020; McKenzie & Lederman, 2020; Swaak, 2025). Institutions failing to clearly differentiate between emergency remote instruction and intentionally designed online learning risk undermining public trust and inviting increased regulatory scrutiny (Hodges et al., 2020). Due to obscurity caused by emergency remote teaching, new instructor development and external relationship building is important to ensure institutions are on track with high-quality teaching across all programs using digital education pedagogies. Emergency remote teaching practices do not have a role in the future of digital education. Strong messaging around public trust should be part of the overall strategy related to external advocacy.

Lastly, external advocacy includes monitoring, shaping the narrative, and communicating about vendor relationships (OPMs, edtech platforms, student support services) to regulators, media, and the public, highlighting transparency and learner protections (McKenzie & Lederman, 2020; Swaak, 2025). Increased federal and state scrutiny of online program management arrangements has elevated the need for transparency in revenue-sharing models, student recruitment practices, and third-party service delivery. Leaders must be prepared to clearly articulate how these partnerships protect learners and align with institutional mission, not just generate enrollment growth.

Key Elements

- **Cultivate strategic alliances.** Represent the institution publicly and authoritatively while developing relationships with employers, governmental offices and legislators, funders, associations, community, academic stakeholders and the general public that align with institutional strategies and priorities and advance the impact of online and digital learning
- **Manage outsourced services.** Oversee third-party partners (e.g., OPMs, ed-tech vendors, student support services) to ensure alignment with institutional mission and priorities, academic quality, and learner protections, with clear expectations, accountability, and regular evaluation of performance
- **Regulatory compliance and accreditation standards.** Ensure alignment with federal, state, accreditor, and licensure board requirements related to distance education, translating key definitions and evolving regulations into clear institutional policies, clarifying instructor expectations, and documenting practices that support ongoing compliance and review readiness

- **Educate external stakeholders** on what quality online education looks like in today's higher education environment and tell the story of the importance of high-quality digital education in serving today's learners
- **Instruct legislative stakeholders** on the importance and complexities of digital education today at local, state, and national levels and influence future legislation for regulation and compliance

Why? Credentials of Value

External advocacy is essential for higher education institutions offering online programs as they confront persistent public skepticism about the value of higher education, ongoing scrutiny of online learning quality, and an increasingly competitive marketplace that includes both traditional institutions and new education providers. At the same time, the growth of non-institutional providers, adaptive learning models, competency-based programs, flipped and hybrid formats, and a proliferation of credentials—including nano-degrees, microcredentials, certificates, and certifications—has contributed to an increasingly complex postsecondary landscape.

Inconsistent terminology and the wide variation in online offerings continue to create confusion for consumers—both learners and employers—particularly as distinctions among credentials are not always clearly understood. Resources such as WorkCred's *How Do Credentials Differ?* highlight the importance of clarifying the meaning, purpose, and value of different credential types (Workcred, 2021).

Product variation continues to expand, shaped not only by institutional strategy but also by the influence of legislatures, employers, and external stakeholders such as NGOs and funders on both the inputs and outcomes of educational offerings.

What? Cultivating Alliances & Partners

Represent Institution Publicly and Authoritatively

Advocacy requires a thorough understanding of the institution's online and digital offerings and its competitive advantages and weaknesses. This understanding will allow for the representation of the institution publicly and authoritatively among and between a diverse set of stakeholders. This role is not optional or symbolic. Inconsistent or uninformed external representation can lead to reputational damage, regulatory inquiry, or misalignment between institutional intent and public perception, particularly among university alumni.

A Chief Online Learning Officer (COLO) should be designated as the senior-most representative to speak on behalf of an institution's online and digital learning enterprise(s). This includes responses to requests for information from the media, accrediting bodies, peer institutions, ranking services, and others. The spokesperson should have both public relations training and understand how digital learning supports the institution's mission and priorities. They must be aware of major online initiatives underway and the key highlights and organizational aspects of the institution's online endeavors.

Cultivate Strategic Alliances

Several important alliances can positively impact an institution's efforts. These alliances should not be pursued opportunistically, but aligned to clear institutional priorities such as enrollment growth, workforce alignment, brand stewardship, research expansion, or policy influence.

Consistent with guidance from Widmer and Cavanagh (2025), an effective COLO must approach relationships as part of an intentional ecosystem of internal and external stakeholders, where each partnership contributes to institutional capacity, credibility, and long-term sustainability, not simply short-term gains. External relationships should be actively curated, regularly assessed, and aligned with institutional mission, academic quality, and student success outcomes (Widmer & Cavanagh, 2025).

Employer and Corporate

Partnerships with employers and industry can be fruitful in many ways, such as helping to recruit new learners, providing them with valuable work experience, aligning programs to employer's needs, and giving instructors access to a wealth of practitioner knowledge and potential research opportunities. By hiring graduates, a corporate partner can acknowledge the value of a curriculum. Becoming a preferred educational partner to an organization establishes a relationship with busy employees who may value the convenience of online and digital learning through their employer's partnership and may lead to improved retention and engagement for the employer. 'Education as a benefit' is an important tool for employers to not only retain their current employees in a difficult job market but also identify and target key skills that will contribute to strategic and mission-aligned priorities.

University-to-business partnerships that are designed to address employer-specific skills gaps scale and replicate most effectively. Institutions should consider how credentials, skills records, and evidence of learning can be communicated in forms that are understandable, verifiable, and usable by employers, workforce partners, and talent platforms (1EdTech Consortium, 2026a).[17]

Often, executives within outside organizations are willing to serve as guest speakers, adjunct faculty, and as members of disciplinary advisory councils. The institution's curriculum benefits from being supported by industry experts who can bolster academic theories in operation. Industry leaders are especially valuable for informing university curricula around new technologies such as AI literacy as they have a vested interest in influencing the skills of their future workforce needs. Corporate partners may also be amenable to hosting remote learners working on special projects as part of their academic assignments, as well as providing valuable internship opportunities. In addition, instructors can benefit from access to the organization as a potential research site and partner to explore innovative approaches to meet workforce needs. These benefits also advance a company's broader goals related to community engagement and social responsibility.

> Trust is built when institutions engage employers, policymakers, and communities as partners rather than audiences.

Government

Alliance with local and state governments provides regulatory support to ensure that policy, law, and operational requirements do not impede an institution's digital learning enterprise. Exposure at these governmental levels is significant to helping educate public servants on the important role the institution plays in the community.

The public sector also offers a learner base that has critical workforce development, continuing education, and mission-aligned training needs where online and digital learning is an effective solution. Employer partnership models in the public sector contribute in meaningful ways to federal readiness, modernization, and the development of talent pipelines.

17 Workforce adoption of digital credentials depends not only on credential issuance, but also on whether credential information can be readily understood, verified, and used within hiring, talent management, and workforce development processes. Emerging digital credential frameworks increasingly emphasize structured skill descriptions, evidence of achievement, trust signals, and interoperability to support employer interpretation and decision-making (1EdTech Consortium, 2026a).

Foundations and Funders

Alliances with foundations and funders provide opportunities to experiment with and grow innovative programs through grants and other support funds and aid the initiatives of foundations and organizations who partner with the institution.

University donors may have a particular interest in funding a facet of online and digital learning (particularly those motivated by educational access). COLOs are also increasingly expected by institutional leadership to demonstrate how digital learning advances innovation within the academic mission and to communicate that value effectively to external funders and strategic partners.

Professional and Industry Associations

Association alliances—those focused on online learning and digital education, and those tied to specific disciplines—can provide highly targeted exposure for an institution's activities. These organizations offer opportunities for collaboration, peer support, professional recognition, insight into regulatory changes, and ongoing education, while also helping validate and strengthen emerging online and digital programs. While this hallmark document is proffered by UPCEA, the authors and editors recognize the value of engaging across a broader ecosystem of associations, where diverse memberships can further enhance institutional perspective, partnerships, and impact.

Community

Learner mobility depends on ecosystems that make learning visible, portable, and valued beyond institutional boundaries.

Understanding the needs of the community (both geographic and virtual) allows an institution to tailor programs accordingly. Community alliances bolster the institution's sense of belonging at the local level. They can provide additional resources to the university, from potential adjunct instructors to event exposure, to learner recruitment opportunities. Perhaps the most important benefit to community advocacy is building awareness that online programs offer yet another study alternative for busy local citizens to achieve their educational goals without sacrificing their careers and responsibilities.

Academic Institutions, Peer and Aspirant

Peer and aspirant academic institutions represent important strategic partners for universities with online offerings, particularly in an era of shrinking resources. Identifying institutions with compatible programs can create operational efficiencies and cost savings, while expanding opportunities to serve students. While most institutions have a specific list of peer institutions, ones that share key institutional attributes, note that these may not be relevant from a digital learning enterprise perspective. Online portfolios can vary among an institutional peer set. Digital learning leaders should explore identifying peer institutions as well as realistic aspirant enterprises, creating important touchstones in their continuous improvement journeys.

While comparison and benchmarking are important, so too is collaboration. Through multi-university memoranda of understanding (MOUs), institutions can collaborate on shared curricula, dual or joint degrees, and even innovative pathways that connect high schools, community colleges, and universities. These alliances foster relationships and communities of practice to support the exchange of ideas, best practices, research opportunities, shared online courses, and virtual student exchanges while broadening the diversity of the virtual classroom.

Manage Outsourced Services

Outsourced service providers are not just operational partners; they are extensions of the institution's brand and carry shared responsibility for learner outcomes, regulatory compliance, and public perception. There are a multitude of potential partners who have the ability to positively influence the outcomes of an institution's online learning operation. Vendors are available to assist with almost every aspect of online learning, from marketing and admissions to tutoring and exam administration. Outsourcing can provide an effective way to gain immediate expertise while mitigating risk. Leaders must establish clear governance and financial structures, performance expectations, and accountability measures to ensure that third-party services align with institutional standards and do not introduce compliance or reputational risk. Effective communication of the unique institutional culture is critical to external entities and prospective learners.

Engage Alumni and Trustee Groups

Alumni and trustee groups span both internal and external stakeholders and play an important external advocacy role for the institution. Alumni are an excellent source of public relations, feedback, idea generation, and peer support, and may become returning learners themselves. Through positive feedback and cultivation, alumni help recruit future learners, enhance the institution's brand image, and may possibly serve as future instructors. Alumni are often conduits for building relationships with other external groups such as employers, government, community, foundations, and other external stakeholders.

Trustees are often engaged in business activities in the region and beyond. Specific efforts should be made to educate trustees about digital learning efforts so they can be important business and community advocates for the institution's programs.

Ensure Regulatory Compliance and Meet Accreditation Standards

Compliance and standards are not only important for external advocacy, they are critical elements at any institution. Leaders should recognize that compliance obligations may include separate obligations associated with state licensing boards, experiential learning approvals, faculty licensure requirements, consumer protection laws, reciprocity agreements, veterans' education benefits regulations, and federal financial aid requirements (Kerensky & Cheverton, 2026; Carroll, et al., 2023). To stay current, institutions should actively engage in industry associations and speak to peers. Failure to proactively manage compliance has moved beyond institutional risk to sector-wide scrutiny, particularly in areas such as distance education classification, state authorization, and third-party partnerships.

Institutions must maintain transparent, accessible, and equitable processes for student complaints, appeals, and consumer protection concerns across all modalities and jurisdictions in which learners are served (C-RAC, 2011; NCHEMS, 2021). Institutions offering programs associated with professional licensure, certification, clinical placement, or state-specific workforce requirements should maintain public-facing information on authorization status, licensure eligibility, field placement limitations, and jurisdiction-specific obligations that may affect learner progression or employment opportunities (Kerensky & Cheverton, 2026). Likewise, information regarding program expectations, costs, refund policies, student rights, and institutional responsibilities must be accurate, current, and readily accessible (C-RAC, 2011; NCHEMS, 2021).

Many institutions designate at least one internal expert who can guide its compliance efforts for the digital learning enterprise. Chief online learning officers must be familiar with federal and state regulations, as well as institutional and professional accreditation standards and processes as well as reciprocity agreements—in order to reflect positively on these critical components of institutional standing. A new online enterprise should anticipate that learners might reside outside state boundaries, and those other states' regulatory processes must be anticipated and addressed to ensure compliance. Additionally, the COLO must be the primary advocate related to any new legislative regulatory consideration. Establishing relationships with decision-makers through legislators and regulatory bodies prior to discussions of new regulatory compliance strengthens the interactions the COLO has as discussions progress toward new legislation.

Who and How? The COLO

As an institution begins to implement online learning, there must be a clear understanding of the public presentation of these programs, perceptions of success, and areas of constraint or concern.

Institutions that excel at external advocacy have a designated leader (COLO) at the helm of their digital learning enterprise who understands the accreditation standards for online education, national quality benchmarks, workforce needs, and measures of success. They have learned how to mobilize and articulate their work to provide clarity and confidence to the external audience. Likewise, they have mapped these concepts into metrics imbued with program outcomes and can produce data to demonstrate adherence to standards.

This requires coordination across diverse campus functional areas and a deft leader who is both collaborative and authoritative. Ultimately, the effectiveness of external advocacy is determined not by messaging, but by the alignment between institutional practice, regulatory expectations, and demonstrable learner outcomes.

Key Performance Indicators

Due to the exposure resulting from the global nature of online education, external advocacy and leadership are a necessity. Success in this area can be measured by:

- **Evidence of External Engagement.** Demonstrated participation in professional associations, conferences, peer networks, and communities of practice that support knowledge sharing and professional growth. Indicators may include:
    - » Active institutional participation in national organizations inclusive of leadership roles held by institutional representatives in these organizations
    - » Development and exploration of strategic partnerships with peer and aspirant academic institutions, both in the United States and internationally, inclusive of shared courses, joint programs, or virtual exchanges
    - » Invitations to contribute to sector reports, panels, or advisory initiatives

- **Evidence of quality and student success.** Demonstrated institutional credibility through strong learner performance, regulatory, accreditation, and external review processes. Indicators may include:
  - » Positive findings from institutional accreditors and regulatory bodies
  - » Full and current compliance with state authorization and accrediting standards
  - » Successful completion of external reviews related to distance and online education
  - » Recognition of program quality through external quality assurance frameworks
  - » Student performance data analysis (retention, completion, and employment data)
  - » Regular and structured collaboration with community, non-profit, and local/regional business partners to assess and address needs
- **Evidence of public awareness.** Demonstrated influence in shaping public understanding and policy environments of high-quality online learning. Indicators may include:
  - » Positive media coverage of the institution's online programs and initiatives to shape the public narrative of online education by publicly sharing outcomes and data transparency
  - » Invitations for institutional leaders to participate in public discussions, expert panels, or policy forums on online learning
  - » Legislative or regulatory developments that are aligned with or supportive of institutional online learning initiatives
  - » Public recognition of the institution as a leader in online and digital learning innovation
- **Evidence of diversified revenue streams.** Demonstrated ability to attract external funding and resources that support innovation and growth in online learning. Indicators may include:
  - » Consistent and emergent grant funding that allows for operational and educational innovations
  - » Collaborative grant or alternative revenue-share proposals involving multi-university partnerships
  - » Expanded educational portfolio of digital credentials, workforce partnerships, and collaborative programs that yield both non-tuition and tuition-based revenues
- **Evidence of online education ecosystem leadership.** Demonstrated leadership in shaping the broader higher education and workforce ecosystem through innovation, collaboration, and knowledge dissemination in online and digital learning. Indicators may include:
  - » Development of consortia or multi-institution partnerships focused on online learning initiatives
  - » Leadership in cross-sector collaborations involving universities, community colleges, K-12 systems, workforce agencies, and/or business and industry partners
  - » Creation or adoption of shared online courses, joint or dual degrees, and pathways across institutions
  - » Institutional leadership in national initiatives related to online learning, learning mobility, digital credentials and other innovations
  - » Dissemination of institutional models through toolkits, frameworks, conference presentations, sector publications, academic research, and through the professional social presence of the COLO

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Hallmark 7: Professionalism, Ethics, and Stewardship

Hallmark Overview

Professionalism requires leaders to exercise sound judgment, communicate transparently, contribute to the profession, and make decisions that advance institutional and learner success. This hallmark focuses on the demonstration of professionalism through ongoing learning, responsible decision-making, ethical conduct, and meaningful contributions to the field.

Major Themes

- Professionalism and ethical leadership
- Quality assurance and assessment
- Continuous improvement
- Accountability and transparency
- Professional development and lifelong learning
- Responsible innovation and stewardship
- Leadership within the broader profession

Connections to Other Hallmarks

As the capstone hallmark, this section reinforces and sustains the work described throughout the framework. It supports instructional quality (Hallmark 3), learner success (Hallmark 4), technology stewardship (Hallmark 5), and external leadership (Hallmark 6) by fostering a culture of evidence-based decision-making and organizational learning.

Most Relevant To

COLOs, institutional effectiveness leaders, accreditation liaisons, quality assurance professionals, faculty leaders, assessment specialists, academic administrators, and professional association leaders

Readers interested in this hallmark may also wish to review: Hallmarks 3, 5, and 6.

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Hallmark Context

Professionalism is essential for long-term success and development of postsecondary education in general, and especially in digital learning. In order to include professionalism as a hallmark, it must be defined. For the purposes of this final hallmark, professionalism is defined as the consistent practice of competence, integrity, respect, and accountability in how one shows up, communicates, and carries responsibility, especially when conditions are complex, stressful, or imperfect (Trevino & Nelson, 2021).

In online education, where complexity is high and change management acumen is at a premium, the development and demonstration of professionalism is essential.

> Professionalism is most visible when conditions are uncertain, complex, and rapidly changing.

Professionalism becomes especially important during periods of institutional change. Leaders who communicate clearly, act consistently, and treat colleagues with respect are more likely to build trust and maintain momentum when introducing new approaches to teaching, learning, and operations. Professional conduct helps institutions navigate disagreement, reduce unnecessary conflict, and sustain productive working relationships. Effective digital learning leaders demonstrate cultural and organizational awareness across the multiple contexts in which their enterprises operate. COLOs work collaboratively within the cultures, governance structures, labor environments, and strategic priorities of their institutions while also navigating relationships with local, regional, national, and international partners. Professional practice requires sensitivity to the varied contexts of learners, instructors, staff, and external stakeholders, recognizing that successful strategies and structures will differ across institutional types, missions, and communities.

Professionalism in digital learning includes ethical and collegial behavior, responsible use of technology, attention to equity and learner outcomes, and a commitment to continuous improvement informed by evidence and scholarship. (Pelletier et al., 2023; Pelletier et al., 2024; U.S. Department of Education, Office of Educational Technology, 2023; Eckerson, Rowe, & McLeese, 2024; Zarifis, 2024).

Key Elements

- **Professionalization of roles.** Professional titles and accurate job descriptions which enumerate the unique duties of digital learning roles must exist. Further, an individual designated as the Chief Online Learning Officer should be charged with institutional online strategy and resource deployment (Uranis, 2023).[18]
- **Engaging constituencies.** Professional digital learning leaders communicate openly, listen carefully to stakeholders, and adapt their approaches as institutional circumstances change. (Hadley, 2023; McKenzie & Lederman, 2020). Further, credibility, respect, and trust must be shared with all constituents including:
    - » Internal constituencies: learners, instructors, staff, institutional leaders
    - » External constituencies: vendors, external funders, regulators & accreditors, political leaders, industry/employers, media, and the public

18 The 2022-2023 Council for Chief Online Learning Officers updated the definition of a Chief Online Learning Officer (COLO), "A Chief Online Learning Officer (COLO) is the primary leader for an online, digital, or other technology-enhanced postsecondary enterprise and can have responsibilities inclusive of, but not limited to, digital and hybrid learning, instructional design, student experience, and faculty development (whether at the unit, college, or institutional level). They influence and/or make critical path decisions in strategic collaboration with other institutional leaders (e.g., outsourcing operational aspects vs. building internal teams, etc.)," (Uranis, 2023).

- **Ethics and stewardship.** Formulate and sustain the ethical aspects of online programs. Articulate and uphold transparent data governance, inclusive of the ethical use of learner data, analytics, and AI strategies. This includes transparency, fairness, and human oversight (U.S. Department of Education, Office of Educational Technology, 2023; Robert & Reinitz, 2023; Pelletier et al., 2024;). Leaders should communicate honestly, explain how decisions are made, and ensure that policies are applied consistently across stakeholder groups.
- **Create and disseminate new knowledge externally.** Support research, presentations, publications, and award submissions. Encourage ongoing evaluation of institutional practices, teaching approaches, and emerging technologies, and share lessons learned with colleagues and the broader profession.
- **Act on new knowledge:** Digital learning units should evaluate promising practices, pilot new approaches when appropriate, and share evidence about what works within their institutional context.

Why? Leadership Development

Because online environments require leadership and approaches that may differ from other postsecondary environments such as classroom-based instruction, professionalism is essential to successful facilitation of collaborations, partnerships, and integrations across academic units. Professionalism is foundational to both new and experienced leaders tasked with developing and scaling innovative courses and programs while also ensuring such programs provide quality education with dependable and measurable learning outcomes.

Those aspiring to leadership roles in digital learning environments must possess self-awareness and have engaged in self-authorship to best determine their individual professional development needs in relation to their career goals. Due to the non-linear career paths many digital learning leaders take, there is no one-size-fits-all approach to leadership or professional development.

What? Demonstrate Professionalism

While professionalism is necessary in all roles at postsecondary institutions, it is vitally important to online operations. The design, development, and delivery of digital learning is often dependent on the competencies and attributes of digital learning leaders, as interpersonal relationships support internal and external partnerships (UPCEA, 2020).

Leaders are often challenged, particularly those without peers at their own institution, to identify specific competencies and leadership frameworks that align with their roles. To that end, in 2020, UPCEA released a list of Competency and Attribute Statements for Professional, Continuing, and Online Practitioners.[19] These 25 competencies and attributes address several key components to leadership in digital learning, inclusive of:

- Entrepreneurship, partnerships and relationship-building
- Resource management
- Supporting and advocating for faculty and students
- Program planning
- Marketing, research, and evaluation
- Information and digital technology
- Critical thinking and decision-making
- Integrity, ethics, and professionalism

19 https://upcea.edu/competency-and-attribute-statements-for-professional-continuing-and-online-practitioners/

It is important to note that while the competency and attribute statements share many of the same concepts as these and other UPCEA hallmarks, they focus on leaders and practitioners in postsecondary professional, continuing, and online learning, while the hallmarks attend to digital learning enterprises and organizations.

Ensure Effective Operational and Administrative Practices

Operational Practices and Strategic Partnerships

The job titles and descriptions for those charged with operational practices should align with standards established by professional associations and certification boards, thus demonstrating the institution's attention to both the profession and community of online and digital learning.

Operational practices should focus on creating and maintaining stable digital learning enterprises built around shared institutional goals for all learners. Communities of practice, committees, work groups, and task forces should be established within and across all divisions and departments. The growth of these communities must be sustained through robust support and resources.

Other units and vendors that support online learners and instructors are extensions of the institution's digital learning enterprise. Strategic partnerships with third-party vendors should be carefully managed and routinely evaluated to support a strong return on investment and alignment with expectations, including professionalism. Leadership should also monitor third-party vendors to ensure compliance with institutional policies, state and federal regulations, and accreditor requirements.

> Ethical leadership requires balancing innovation with responsibility, opportunity with risk, and progress with accountability.

Outsourced services should be critically monitored, as should the decision to form strategic partnerships with vendors in support of greater return on investment. All aspects of online education, even those delegated to external agents or decentralized within the university, should be included and considered as part of the professionalism of the enterprise. Likewise, there is a compliance aspect to third-party services that must be managed (UPCEA, 2026).[20]

Management and Administrative Practices

Institutional leaders must establish and sustain a respectful environment for staff supporting the online enterprise, such as instructional designers, instructional technologists, and online success advisors to enhance their support of faculty and students. While some may have their own understandings of academic freedom and intellectual property rights, institutional leaders must define and set policies for these concepts. Further, clear and well- articulated student complaint processes are both required for NC-SARA compliance, and necessary to fully embrace continuous improvement and feedback loops.[21]

Digital Learning Compliance

Digital learning compliance requires sustained institutional investment, professional development, and operational support.

20 UPCEA Policy Primer, Managing Compliance and Risk in Third-Party Partnerships for Online Learning, (UPCEA Policy Committee, 2026)

21 SARA Student Complaint Process, SARA Policy Manual, Version 25.2, Section 4. (National Council for State Authorization Reciprocity Agreement, 2025).

Personnel responsible for state authorization, professional licensure compliance, accessibility obligations, distance education regulations, and related governance functions should understand the laws, regulations, policies, and institutional contexts relevant to digital learning. Specifically, these include:

- Federal distance education regulations
- State authorization requirements
- Professional licensure disclosures
- Institutional policy interpretation
- Student consumer protection requirements
- Accessibility compliance
- Data governance and reporting
- Project management
- Cross-functional institutional coordination

Institutions should support participation in professional organizations and communities of practice related to digital learning governance and compliance (UPCEA, 2020; Kerensky & Cheverton, 2026; Carroll, et al., 2023).

Crisis Management

Much of the work of higher education professionals in recent years has been in crisis management, responding to the rapidly changing nature of institutions due to emerging technology, federal and state policy changes, and shifting local trends in higher education; in some cases, online education has been the lifeline of an institution. In professionalism, and especially leadership, roles have evolved to interpreting these changes and responding to them to ensure learners' access to programs, institutions, and degree attainment. Leaders must shepherd teams, colleagues, and systems through these moments to ensure each has longevity. Crisis management for the Chief Online Learning Officers is no longer episodic—it is a continuous leadership function that requires anticipating disruption, not just reacting to it as reflected in sector conversations around navigating 'polycrises' and regulatory change. Effective leaders must build resilient systems, empower distributed decision-making, and translate uncertainty into coordinated institutional action, designing adaptive, future-ready digital learning ecosystems that can absorb and respond to ongoing change.

Managing Conflict

Professionalism plays a critical role in managing conflict surrounding digital learning, where misunderstandings can escalate quickly, and trust is often more fragile than with other modes of instruction. In digital environments, the absence of nonverbal cues, differences in expectations about responsiveness, and heightened stress around workload, access, or technology can intensify disagreements between learners, instructors, and administrators. Professionalism, understood as clear communication, respect for differing perspectives, consistency in standards, and accountability, creates a stabilizing framework for navigating these tensions. It allows conflicts to be addressed as shared problems to be solved rather than personal failures or adversarial disputes. Professionalism and conflict management strategies form the foundation for effective crisis intervention. When professionalism is practiced intentionally in online education, it helps shift conversations from blame to dialogue, preserves relationships across power differences, and reinforces the legitimacy and credibility of online learning as a serious and equitable academic space.

Encourage Research, Presentations, and Publications

Research

Encourage scholarship to support the study of digital teaching and learning. Leaders of online units, instructors, and course designers should be engaged in a variety of discipline-based approaches relevant to digital learning-related scholarship. Further, leaders should promote and support research collaborations between instructors and learning design professionals. Research that impacts the classroom, both longitudinal and theoretical in nature, encourages a variety of practices that can be explored and utilized to assist with growth and innovation in the field. The scholarship of teaching and learning (SoTL) focused on online and multimodal contexts (Bates, 2022) should be considered.

Presentations and Publications

Online learning practice includes reporting on new program development continuously and persistently in professional and lay press. Leaders should encourage presentations and publications by administration, staff, and instructors in the field of digital teaching and learning. Ideally, this external outreach should include collaborations with P-12 colleagues which create comprehensive and sustainable partnerships, leading to greater understanding of online learning for the general public, inclusive of potential learners and industry partners.

With regard to instructors, presentations related to teaching and learning in digital environments should be recognized in tenure and promotion requirements. While scholarly work is often limited to disciplines, tenure and promotion criteria should be expanded to include conferences and journals that specialize in the field of teaching and learning, specifically multimodal learning.

Who and How?

A culture of professionalism is essential from the inception of an online initiative and throughout its lifecycle. This culture is supported by leaders who model ethical and professional behavior in all actions.

Policies should undergird professional expectations and desired outcomes. Procedures should be followed to ensure that a culture of professionalism is established and maintained with all constituents across the institution.

Workload Sustainability

Institutions should regularly assess workload sustainability, staffing sufficiency, and operational risk associated with digital learning enterprises. They should avoid assigning expanding responsibilities without corresponding operational support, role clarity, or resource allocation.

Ambassadors and Champions

As noted in the preceding hallmarks, instructors and staff play important roles as champions of digital education. Ultimately, the measure of success for digital leadership is more than simply providing basic services such as course design or technology training. A forward-thinking enterprise 'reaches across the aisle' to engage educators in secondary education, providing resources which support digitally ready learners. By preparing future learners for digital environments early in their academic careers, learners can achieve learning outcomes and career success beyond what has been historically possible. Advances in technology and shifting mindsets stemming from the COVID-19 pandemic offer a world of opportunity for today's learners and can propel the entire institution to excellence and innovation in digital education.

Key Performance Indicators

Professionalism must be exhibited as a behavior in the experiences of learners and instructors, and in different contexts. The following key performance indicators should include:

Leadership Capacity and Organizational Infrastructure

- Establish and maintain a COLO (or equivalent) role with defined scope and authority, including:
  - » Span of control across online/digital learning functions
  - » Ratio of staff-to-programs or enrollments (benchmark-based)
- Measure leadership effectiveness through:
  - » Annual 360° leadership evaluations
  - » Achievement of strategic plan milestones

Ethics, AI Governance, and Professional Standards

- Adopt and establish AI strategies in ai governance, AI enablement, and AI literacy for enterprise-wide effectiveness.
- Achieve high level of completion of AI/data ethics training annually across faculty and staff
- Document and annually review institutional AI and data ethics policies
- Track reported ethical incidents related to AI/data use and resolution time

External Validation and Reputation

- Maintain successful accreditation outcomes with no major findings related to digital learning
- Track number of external recognitions (rankings, awards, invited reviews) annually
- Benchmark institutional performance against peer and aspirational institutions

Scholarly and Practice-Based Contributions

- Track annual scholarly and applied outputs per staff, including:
  - » Peer-reviewed publications
  - » Conference presentations
  - » Practice reports and white papers
- Set targets (of at least one contribution to the field per professional staff member annually)

Institutional Influence and Integration

- Measure representation in institutional governance, including:
  - » Percentage of senior committees with online/digital learning representation
- Track number of strategic initiatives led or co-led by online learning leadership
- Assess integration into academic planning and program portfolio decisions

Governance, Advisory, and Transparency Structures

- Maintain active advisory boards with defined membership and representation at meetings and events.
- Track implementation rate of advisory board recommendations
- Publish annual impact reports for digital learning performance

Instructional Professionalism and Engagement

- Percentage of instructors completing online teaching certification or training
- Instructor satisfaction with support for online teaching
- Adherence to instructional quality standards

Learner-Facing Professionalism

- Learner satisfaction with faculty responsiveness and professionalism
- Response time standards (e.g., instructor response within 24-48 hours)
- Complaint/grievance rates related to instructional quality or conduct
- Compliance with state complaint processes

Operational Reliability and Service Quality

- Service-level agreement performance for instructional design, tech support, etc.
- Time-to-resolution for faculty/student issues
- System uptime and reliability metrics

Continuous Improvement and Innovation

- Percentage of programs undergoing annual review and improvement cycles
- Number of pilots/innovations tested and scaled annually
- Time from idea to implementation for new initiatives

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AI Use Disclosure

Artificial intelligence (AI) tools were used in a limited and supportive capacity during the development and refinement of this document. The contributing editors have determined the use of AI to align with 'moderate use' and have opted to provide a full disclosure of the AI used in preparing the 2026 Hallmarks.[22]

A custom ChatGPT-based assistant was used to support research synthesis, comparative analysis, editorial review, and drafting activities throughout the revision process. AI-assisted analyses were used to help identify areas requiring updates, compare these Hallmarks against external frameworks and emerging practices, evaluate consistency across sections, identify potential gaps or redundancies, and generate draft language for consideration by the contributing authors and editors. Contributing authors and editors engaged in multiple rounds of human revision to refine clarity, strengthen alignment with institutional perspectives, and ensure consistency in tone and intent. In several instances, authors requested AI-assisted revised or alternative phrasings after these human edits to improve readability and precision.

AI tools also assisted in the development of synthesized sections of the document, including the Executive Summary and the section describing changes from the 2016 Hallmarks. In addition, AI-assisted editorial review was used to suggest revisions intended to improve clarity, readability, organization, and consistency of terminology throughout the document.

All AI-generated analyses, recommendations, and draft language were reviewed, revised, validated, or rejected by the contributing editors. No content was included solely on the basis of AI-generated output. Human contributors maintained full responsibility for source selection, interpretation, factual accuracy, professional judgment, editorial decisions, and the final content of the document. AI-generated recommendations were evaluated against cited sources, professional expertise, reviewer feedback, and institutional practice prior to adoption. AI tools served as supportive editorial and analytical aids and were not considered authors of this work.

At all stages, human contributors maintained full responsibility for the accuracy, integrity, and final content of the document.

22 Damm, C., & Eaton, L. (2026) propose a GenAI Use Transparency Framework for higher education that encourages clear documentation and disclosure of AI-assisted work. Their framework emphasizes transparency as a mechanism for preserving trust, integrity, and accountability while affirming that humans remain responsible for the accuracy, review, and final content of AI-assisted outputs.

Concept Index

H1 – Internal Advocacy and Leadership Within the Institution

H2 – Entrepreneurial Initiatives

H3 – Instructional Support

H4 – Learner Support

H5 – Technology and Digital Innovation

H6 – External Advocacy and Leadership Beyond the Institution

H7 – Professionalism, Ethics, and Stewardship

Concept	Primary Hallmark	Additional Hallmarks
Academic Integrity	H3	H2, H4, H5
Accessibility	H5	H1, H2, H3, H4, H6, H7
Artificial Intelligence (AI)	H5	H1, H2, H3, H4, H6, H7
AI Governance	H5	H1, H2, H3, H4, H6, H7
AI Literacy	H5	H3, H6, H7
Chief Online Learning Officer (COLO)	H1	H2, H5, H6, H7
Competency-Based Education (CBE)	H6	H2
Comprehensive Learner Record (CLR)	H5	H4
Consumer Protection	H6	H1, H2, H5, H7
Course Quality	H3	H4
Cybersecurity	H5	—
Data Governance	H5	H1, H2, H7
Digital Credentials	H6	—
Digital Learning Enterprise	H1	H6, H7
Digital Transformation	H1	H5
Distance Education	H6	H1, H3, H4, H7
Employer Partnerships and Engagement	H6	H1, H2, H4, H7
Equity in Outcomes	H1	H3, H5
Faculty Governance	H1	H2, H3
FERPA	H5	H3, H4
Instructional Design	H3	H1, H2, H4, H5, H7
Interoperability	H5	H2, H4
Learner Analytics / Learning Analytics	H4	H1, H5
Learner-Centered Design	H4	H1, H5
Learner Mobility	H2	—

Concept	Primary Hallmark	Additional Hallmarks
Learner Success	H4	H1, H3, H5
Learning and Employment Record (LER)	H5	—
Learning Management System (LMS)	H5	H1, H3, H4
Lifelong Learning Ecosystem	H1	—
Market Research	H2	—
Microcredentials	H6	H4
Multi-Modal Learning	H1	H2, H4, H6, H7
Online Program Management (OPM)	H6	H2, H4
Open Educational Resources (OER)	H3	H4
Portfolio Management	H1	H2, H5, H6, H7
Prior Learning Assessment (PLA)	H4	—
Privacy	H5	H1, H2, H4
Professional Licensure	H5	H1, H3, H4, H7
Quality Assurance	H3	H1, H2, H4, H6
Regular and Substantive Interaction (RSI)	H6	H3, H4
Return on Investment (ROI)	H2	H1, H4, H7
Scenario Planning	H1	—
Strategic Enrollment Management (SEM)	H1	—
State Authorization	H6	H1, H2, H4, H5, H7
Student Information System (SIS)	H5	H1, H4
Success Coaching	H4	H1, H2
Third-Party Partners and Vendors	H5	H1, H2, H3, H4, H6, H7
Universal Design for Learning (UDL)	H3	H4
Workforce Alignment	H2	H1, H3, H6
Work-Integrated Learning	H6	H1, H4

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