CHLOE 10

MEETING THE MOMENT: NAVIGATING GROWTH, COMPETITION, AND AI IN ONLINE HIGHER EDUCATION, 2025

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THE CHANGING LANDSCAPE OF ONLINE EDUCATION, 2025
Quality Matters, Eduventures & EDUCAUSE Survey of Chief Online Learning Officers

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> ***The CHLOE Report categorizes institutions by size of fully and partly online enrollment as follows:**
>
> 1. **Low online enrollment institutions (low-OE)** = Less than 1,000 online students
> 2. **Mid or mid-sized online enrollment institutions (mid-OE)** = 1,000 - 7,500 online students
> 3. **High online enrollment institutions (high-OE)** = More than 7,500 online students

SUGGESTED CITATION

Simunich, B., Garrett, R., Fredericksen, E. E., Gay, K. (2025). CHLOE 10 | Meeting the Moment: Navigating Growth, Competition, and AI in Online Higher Education, 2025. Retrieved from the Quality Matters website:

https://qualitymatters.org/qa-resources/resource-center/articles-resources/CHLOE-10-report-2025

CHLOE 10 | MEETING THE MOMENT: NAVIGATING GROWTH, COMPETITION, AND AI IN ONLINE HIGHER EDUCATION

The Changing Landscape of Online Education, 2025

EXECUTIVE SUMMARY

The CHLOE Project marks a milestone with its tenth national survey and report. Over the past decade, online learning in U.S. higher education has advanced in scale, sophistication, and strategic importance. The chief online learning officer (COLO) – the institutional leader responsible for digital learning and the CHLOE respondent – now plays a central role in institutional strategy and decision-making. The CHLOE Project has chronicled the rise of both the modality and the role of the COLO.

CHLOE 10 captures current realities and emerging priorities for online learning, offering insight into demand, strategy, and preparedness.

Online Demand and Rising Competition

Student demand for online learning remains strong across all sectors and student types. Asynchronous offerings remain dominant, but interest in hybrid modalities is growing. This sustained demand brings intensified competition: 79% of COLOs say the online marketplace is more competitive than it was five years ago. Institutions with high-quality design, flexible delivery, and differentiated offerings are best positioned to thrive.

Student Support, Orientation, and the Evolving Experience

Support for online learners continues to improve, particularly in advising and accessibility, though gaps persist, especially in areas such as clubs and student organizations. While 83% of institutions offer online-specific orientation, this is a slight decline from previous years. However, for those institutions that do offer one, more are requiring it, perhaps signaling recognition that preparation is essential despite assumptions that students are already digitally fluent. Looking ahead, COLOs envision an increasingly hybrid student experience shaped by AI tools, personalized learning, and diminished reliance on lectures and traditional classrooms. Expectations and needs differ significantly across undergraduate and graduate student populations.

Growth in Both Degree and Nondegree Options

Online program growth is expected in an ever-more competitive online marketplace. While degree programs remain the core of online strategy, investment in nondegree programming has surged. Nearly two-thirds (65%) of COLOs now report significant investment in nondegree offerings, compared to 29% in 2019. Major investment more than quadrupled (from 3% to 15%). These efforts, while promising, are often decentralized and vulnerable to leadership changes. Institutions with strong leadership, design capacity, and hybrid flexibility are more likely to effectively scale both degree and nondegree options.

Governance and Revenue Models Remain Complex

Most COLOs report that academic departments hold primary influence over program development, though central administration is gaining ground, likely driven by strategic imperatives such as the "demographic cliff." Revenue-sharing models for online programs vary widely, and most COLOs are either dissatisfied or uncertain about their institution's current approach. Models that direct funds to both academic units and central offices are best positioned to incentivize growth and sustain support infrastructure.

Faculty Readiness and Instructional Capacity Lag Behind

Despite learning management system (LMS) adoption progress, faculty readiness to design and teach online courses remains limited. Only 28% of institutions rate their faculty as fully prepared for online course design. Adjuncts carry the largest share of online teaching, but gaps in training and support persist across all faculty types. Without sustained investment in professional development and continuity planning, institutions may struggle to maintain quality or scale online offerings, particularly in the face of future disruptions.

Emergency Planning and Digital Equity Gaps Persist

Despite the pandemic's lessons, many institutions remain underprepared for future instructional disruptions. Only 28% report having a documented academic continuity plan, and faculty preparedness is uneven. While many institutions offer student technology support, the digital divide remains a barrier for some students. Public two-year institutions (Public 2Y) report greater impacts of the digital divide, highlighting continued equity challenges.

Data Strategy, Governance, and Privacy Are Works in Progress

COLOs overwhelmingly agree that data analytics and literacy are essential for improving online learning and supporting decision-making. However, many institutions face challenges with data governance and a lack of clear definitions or shared understanding. While most respondents are confident in their abilities to partner with data privacy professionals, gaps remain in institutional policy clarity and consistency across sectors.

AI Investment and Strategy Are Emerging

AI is emerging as a strategic priority for online learning, though most institutions are still in early stages. Only 23% report having an institution-wide AI strategy, while 66% describe localized efforts. COLOs expect AI to become significantly more critical in the next two years, especially for preparing students for the workforce, improving student learning, and exploring new teaching and learning methods. AI is already used to support course development, workload efficiency, and accessibility, but concerns remain about equitable access and responsible implementation.

The findings from CHLOE 10 depict a maturing online learning landscape that is expanding in ambition but still facing persistent challenges. While infrastructure and innovation have advanced, strategic alignment, faculty readiness, and equitable access require renewed investment. **As institutions navigate enrollment pressures and shifting student expectations, online success will depend on clear strategy, cross-campus collaboration, and a sustained commitment to quality.**

ONLINE DEMAND AND THE EVOLVING STUDENT EXPERIENCE

Online Demand

Student Interest in Online Learning Remains Strong—and Growing

Across higher education, student demand for online learning continues to rise, particularly among adult learners and graduate students. Among traditional-age undergraduates, online options offer needed adaptability for part-time jobs, internships, or housing instability. While flexibility has long attracted students to online formats, the perception of online as a valid and even preferred mode has solidified post-pandemic, aligned with institutional expansion of online options.

In CHLOE 8 (2023), chief online learning officers (COLOs) reported a marked increase in online interest from Fall 2021 to Fall 2022 across three key groups: traditional-age undergraduates, adult undergraduates, and graduate students. CHLOE 10 revisits this finding to assess whether interest has continued to climb. The answer is a resounding yes: comparing Fall 2024 with Fall 2023, COLOs again reported significant growth in interest across all groups, surpassing even the elevated levels two years ago.

- Traditional-age undergraduates: 60% of COLOs reported increased interest (up from 59% in CHLOE 8); those noting declining interest fell from 5% to 4%.

- Adult undergraduates: 66% reported increased interest (up from 57%).

- Graduate students: 74% reported increased interest (up from 63%), with corresponding declines in "same level of interest" and "less interest" responses.

Figure 1. COLOs See Online Interest Continuing to Rise Across All Student Groups (2022 vs. 2021: Sample = 183–257) (2024 vs. 2023: Sample = 180–245)

	'22 vs. '21 Increased Interest	'24 vs. '23 Increased Interest
Traditional-Age Undergraduates	59%	60%
Adult Undergraduates	57%	66%
Graduate Students	63%	74%
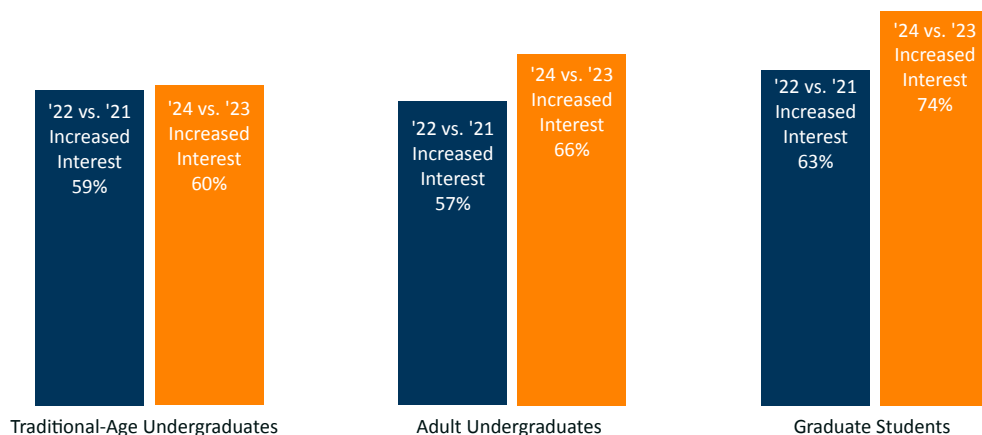
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Although traditional undergraduates are less likely to enroll in fully online programs, they increasingly register for online courses, often due to scheduling constraints or personal circumstances, such as living at home for financial reasons. Several COLOs observed that while students express a preference for in-person learning, enrollment patterns tell a different story: "Post-pandemic, students are asking for face-to-face, then enrolling in online."

While 90% of COLOs expressed confidence in their understanding of student demand, some acknowledged that their institutions do not collect detailed data on student preferences or behaviors. This acknowledgement prompted more than one remark that the CHLOE survey questions encourage a deeper consideration of the importance of collecting this information.

The Evolving Online-Campus Intersection

A recurring theme in the CHLOE Project is how online learning reshapes pedagogy, programming, and the student experience at campus-oriented institutions. What role does online play in courses and programs today? How does it vary by student type? And how do COLOs expect that role to evolve in the next five years?

This section is divided into two parts:

1. Online Modality Trends, showing prevalence by course, program, and student type
2. The Evolving Student Experience, using COLO-selected keywords

Online Modality Trends

Online Course Modality: Asynchronous Remains Dominant

The CHLOE 10 Survey asked COLOs to report the prevalence of online course modalities: fully asynchronous, mixed (synchronous + asynchronous), and hybrid (online + on-site) across three student groups: traditional-age undergraduates, adult undergraduates, and graduate students.

To measure prevalence, CHLOE 10 used the following scale:

- Universal: 90%+ of a student group enrolls in that modality
- Most: 50–89%
- Some: 20–49%
- Rare/Not Available: Up to 19% or not offered

Figure 2 sets out responses for the three online course types across the three student types (ordered from highest to lowest for "universal"). The student types are abbreviated as "Trad UG" (traditional-age undergraduate), "Adult UG" (adult undergraduate), and "Grad" (graduate student).

Figure 2. Asynchronous Continues to Dominate 'Online,' but Modalities Are Rarely Universal[1] (Sample = 184–224)
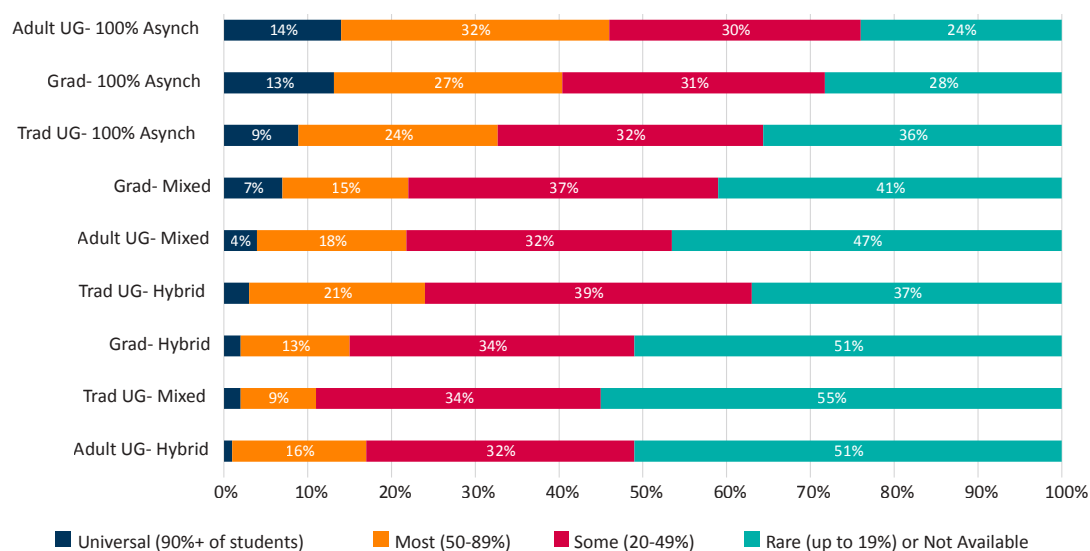
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[1]Footnote: one striking finding—compared to a similar question in CHLOE two years earlier (i.e., Fall 2024 vs. Fall 2022)—is the difference between "widely used" in CHLOE 8 and "universal" in CHLOE 10. In response to the CHLOE 8 Survey, 60% of COLOs who enrolled such students said that fully asynchronous online courses were widely used at their institutions. Yet, only 14% of COLOs in CHLOE 10 said that 90%+ of such students enrolled in these courses.

Nearly half of COLOs (46%) reported that at least 50% of their traditional-age undergraduates enroll in fully asynchronous online courses. Another 30% indicated more limited participation (20–49%), and the remaining 24% reported rare or no use of this modality, often reflecting institutions that do not offer fully asynchronous courses.

Across all student groups and course types, "universal" enrollment was rare, highlighting the diversity of institutional approaches and student preferences.

While sector differences were limited at the "universal" level, notable patterns emerged:

- Community colleges were most likely to report that a majority (50–89%) of traditional-age undergraduates take fully asynchronous courses, while

- Private four-year (Private 4Y) institutions were far more likely to describe such enrollment as rare (59% vs. 33% for Public 4Y institutions and 12% for Public 2Y).

Modality choices aren't driven solely by student demand. Faculty preferences and institutional identity, especially among senior administrators, also shape what's offered and to whom.

Unsurprisingly, high-online enrollment (high-OE) institutions (7,500+ fully or partially online students) were more likely to report universal enrollment of traditional-age undergraduates in fully asynchronous courses than the average. But even among these schools, the rate was modest at just 14%.

Across all student types, fully asynchronous courses are the most prevalent modality, outpacing mixed and hybrid formats.

- Traditional-age undergraduates are most likely to encounter hybrid courses, reflecting institutional efforts to preserve some in-person interaction.

- Adult undergraduates and graduate students are more likely to engage in mixed (synchronous + asynchronous) courses than their younger peers, but fully asynchronous remains the dominant format for both groups.

Online Program Modality: Few Universals, Growing Hybrid Interest

Online degree programs remain less prevalent across all student groups, with few institutions reporting universal enrollment in any modality type. The notable exceptions are fully asynchronous degree programs for graduate and adult undergraduates, where usage is more common. However, the typical CHLOE 10 institution reports that fewer than a fifth of students of any type are enrolled in any online or hybrid degree program. Figure 3 ranks online degree programs by student type, from highest to lowest based on "universal" (90%+) enrollment.

**Figure 3. Asynchronous Degrees Are Commonplace Only for Adults and
Graduate Students (Sample = 184–224)**
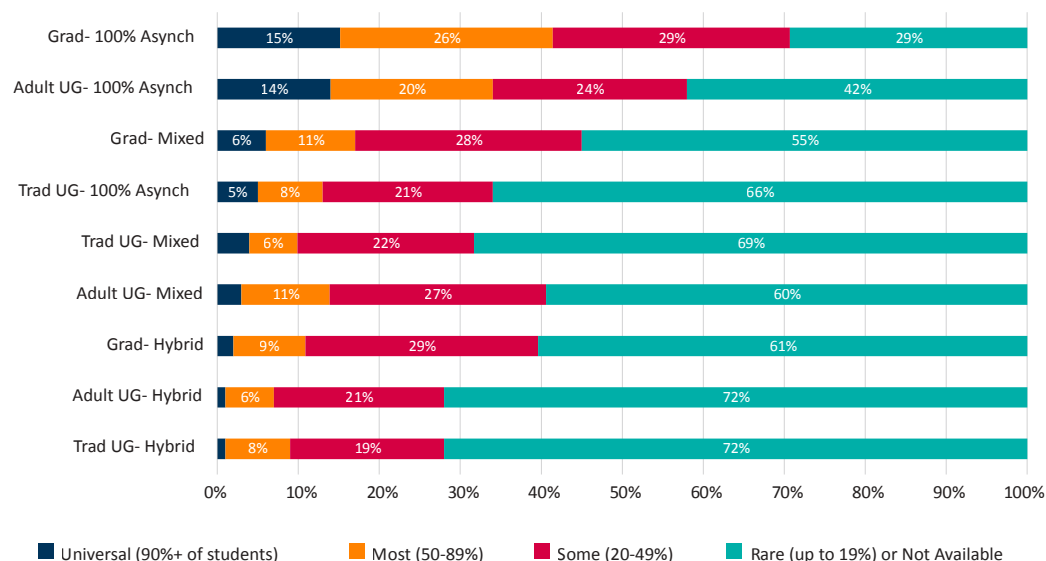
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Very few institutions are defined by a single program modality, which helps explain the low universal enrollment rates. As at the course level, heterogeneity in program offerings and decentralized decision-making often prevent the emergence of a dominant delivery model.

Across all student types, hybrid programs (online and on-site) rank lowest in combined "universal" and "most" prevalence. However, there are signs of interest:

- At the graduate level, over 40% of COLOs reported that at least 20% of students are enrolled in a hybrid degree program.
- Graduate programs combining asynchronous and synchronous elements are only slightly more common than those offering a hybrid (online/on-site) structure.

Even among traditional-age undergraduates and adult undergraduates, hybrid programs are gaining ground:

- More than 25% of institutions reported at least 20% enrollment in hybrid programs for these groups. (This percentage suggests momentum for hybrid delivery over the past two years, likely driven by competition in the fully online market and growing student interest in pedagogical variety.)

Community colleges are leading in hybrid adoption for adult undergraduates, with 49% of COLOs reporting that at least 20% are enrolled in hybrid programs. This hybrid program enrollment aligns with a focus on hands-on technical and workforce-oriented degrees, often blending online coursework with experiential learning. The trend is similar for traditional-age undergraduates: 46% of COLOs at community colleges reported that at least 20% of students in this group are enrolled in hybrid degree programs.

Nondegree Program Modality: Limited Online Scale, Modest Sector Differences

Across most institutions, nondegree program enrollment remains limited, with little evidence of large-scale online adoption (though this area is poised for growth, as discussed later in the report). These programs also show greater uniformity in enrollment patterns across student type and delivery modality. Figure 4 examines nondegree programming by modality, comparing fully asynchronous and hybrid formats.

**Figure 4. Few Students Are Enrolled in Nondegree Programs
(Sample = 184–224)**
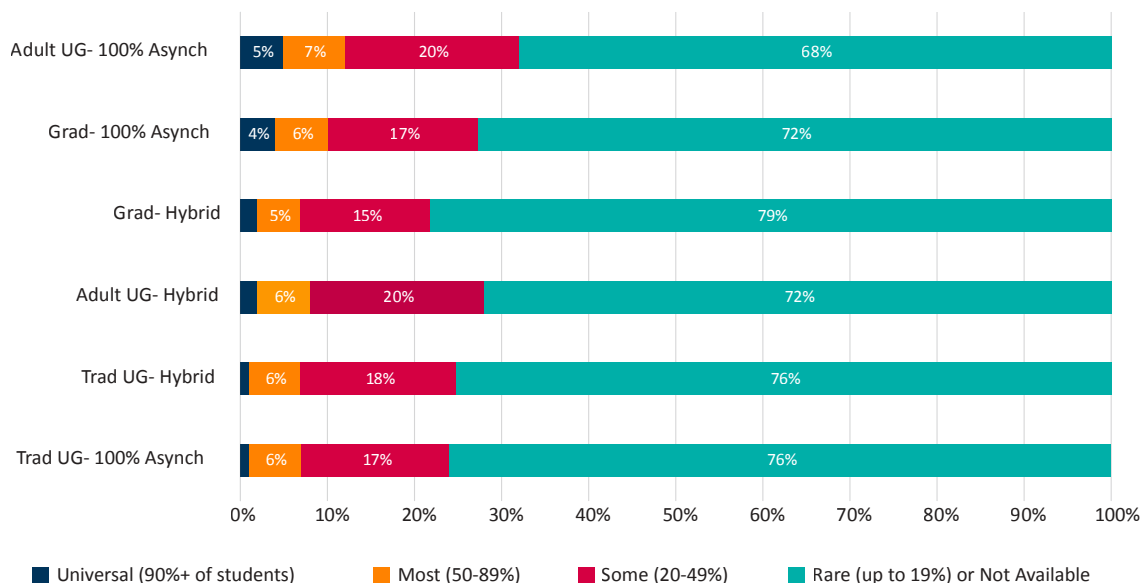
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CHLOE 10 findings reinforce the view that nondegree offerings are still marginal at many institutions. In most cases, such programs serve as stackable credentials or pathways to a degree, rather than standalone alternatives.

Community colleges stand out slightly. They are more likely to report higher enrollment in online and hybrid nondegree programs, especially for traditional-age and adult undergraduates. Still, overall enrollment levels remain modest, and differences by sector or institutional online enrollment size are minimal.

The Evolving Student Experience

Keywords Show COLOs Anticipate a Shift Away from the Physical Campus and Toward AI, Adaptive Learning, and Blended Modalities

The CHLOE 10 Survey asked COLOs to select five keywords (from a provided list) that best characterize the current student experience at their institutions across three groups: traditional-age undergraduates, adult undergraduates, and graduate students. They were then asked to select five keywords they believe will define the student experience five years from now.

Traditional-Age Undergraduates: Physical Classroom Still Central Today, but AI and Hybrid Features Poised to Rise

For traditional-age undergraduates, the most frequently selected current descriptor was "physical classroom" (70%), underscoring that, despite growth in online learning, the traditional campus experience still dominates for this student group. However, COLOs anticipate significant change. By 2030, only 32% expect the physical classroom to remain central for traditional-age undergraduates—a 38 percentage point drop.

Sharp declines are also projected for "full-time faculty" (down 21 percentage points), "residential" learning (down 21 percentage points), and "lecture-based" instruction (down 26 percentage points). These changes suggest not necessarily a disappearance of these elements, but a reduction in their

salience. For example, the "full-time faculty" decline likely reflects a shift in instructional delivery modes rather than widespread faculty attrition.

In contrast, the most frequently predicted descriptors of the 2030 student experience are:

- Digital course materials (50%)
- A mix of online and campus experiences (48%)
- AI support services (43%)
- AI tutoring (31%)
- Adaptive learning (21%)

Both "digital course materials" and a "mix of online and campus" activities are in the "Top 5" today. Neither is predicted to shift much in significance. Instead, other keywords prominent today are expected to decline.

Table 1 presents the results for traditional-age undergraduates, showing current and projected keyword frequencies. Percentage point increases of 10 or more are highlighted in green; equivalent declines are in red.

Table 1. Typical Traditional-Age Undergraduate Student Experience: COLO Keyword Selection (Today & Five Years Out) (Sample = 192)

Keyword	% Currently Describe	% Five Years Out (percentage point- PP- change)
Physical Classroom	70%	Down 38 PP (32%)
Full-Time Faculty	56%	Down 21 PP (35%)
Mix of Online & Campus	51%	Down 3 PP (48%)
Residential	50%	Down 21 PP (29%)
Digital Course Materials	48%	Up 2 PP (50%)
Online Asynchronous	45%	Down 11 PP (34%)
Lecture	43%	Down 26 PP (17%)
Social	22%	Down 2 PP (20%)
Physical Course Materials	19%	Down 18 PP (1%)
Work Experience	19%	Up 3 PP (22%)
Practitioner Faculty	14%	Down 4 PP (10%)
Online Synchronous	11%	Up 6 PP (17%)

Keyword	% Currently Describe	% Five Years Out (percentage point- PP- change)
Simulations	7%	Up 7 PP (14%)
Seminar	6%	Down 1 PP (5%)
Immersive	4%	Up 10 PP (14%)
Competency-Based	3%	Up 15 PP (18%)
Self-Paced	3%	Up 6 PP (9%)
Adaptive Learning	2%	Up 19 PP (21%)
AI Tutoring	2%	Up 29 PP (31%)
AI Support Services	1%	Up 42 PP (43%)

These projections point to a more fragmented and technology-enhanced student experience. The leap in AI-related keywords is particularly striking—"AI support services" was selected by only 1% of COLOs for today's experience, but 43% for five years out. "AI tutoring" grew from 2% to 31%.

Despite predictions of transformation, some elements remain stable. "Social" was selected by 22% of COLOs as a current descriptor and 20% for five years out. "Work experience" rose slightly (19% to 22%), while "seminar" remained low and flat (6% to 5%).

"Online asynchronous" learning is forecast to drop in perceived centrality (45% to 34%). At the same time, "online synchronous" learning is expected to grow (from 11% to 17%), though it remains relatively marginal. This change from asynchronous to synchronous suggests diversifying online learning elements away from the asynchronous default, perhaps favoring video conferencing and remote work experiences.

"Adaptive learning" rose from 2% to 21%, reflecting cautious optimism about scalable personalization. Innovations such as "simulations," "immersive" experiences, "competency-based" learning, and "self-paced" formats show growth, but none are projected to exceed 20% in overall prevalence. Interestingly, low-online enrollment (low-OE) schools (28%) selected "adaptive learning" more frequently than high-OE schools (16%), possibly indicating that more experienced institutions have tested the approach and have become more cautious. In contrast, schools newer to online may see untapped potential.

Additional differences by institutional characteristics also emerged:

- Smaller institutions are more likely to emphasize "full-time faculty," "seminars," and "online synchronous" learning today. At the same time, larger schools rely more heavily on adjunct faculty, asynchronous delivery, and lecture-based instruction. By 2030, both groups anticipate similar shifts in modality and experience.

- The current gap in perceptions of the centrality for the traditional-age undergraduate student experience of "mix of online and campus" between high-online (62%) and low-online (28%) enrollment schools is expected to narrow (to 53% vs. 40%).

Today, schools with 7,500+ fully or partly online students are more bullish about AI than their smaller counterparts: 38% of high-OE schools think "AI tutoring" will be fundamental for these students in five

years, compared to only 20% of COLOs at low-OE schools. The gap for "AI support services" (45% vs. 20%) is even wider, likely reflecting resource disparities and greater exposure to AI tools at larger institutions.

Adult Undergraduates: Asynchronous Still Dominates, but AI and Competency-Based Learning Gain Ground

Table 2 shows COLO keyword selections for adult undergraduates' current and projected student experiences.

Table 2. Typical Adult Undergraduate Student Experience: COLO Keyword Selection (Today & Five Years Out) (Sample = 175)

Keyword	% Currently Describe	% Five Years Out (percentage point- PP- change)
Online Asynchronous	81%	Down 9 PP (72%)
Mix of Online & Campus	65%	Down 19 PP (46%)
Digital Course Materials	65%	Up 4 PP (69%)
Physical Classroom	46%	Down 23 PP (23%)
Full-Time Faculty	43%	Down 16 PP (27%)
Work Experience	43%	Down 5 PP (38%)
Lecture	42%	Down 30 PP (12%)
Practitioner Faculty	25%	Down 6 PP (19%)
Online Synchronous	25%	Up 6 PP (31%)
Physical Course Materials	17%	Down 16 PP (1%)
Residential	11%	Down 6 PP (5%)
Seminar	9%	Down 1 PP (8%)
Simulations	8%	Up 7 PP (15%)
Immersive	8%	Up 1 PP (9%)
Self-Paced	8%	Up 9 PP (17%)
Competency-Based	7%	Up 20 PP (27%)
Social	5%	Up 1 PP (6%)

Keyword	% Currently Describe	% Five Years Out (percentage point- PP- change)
Adaptive Learning	4%	Up 20 PP (24%)
AI Tutoring	2%	Up 32 PP (34%)
AI Support Services	2%	Up 49 PP (51%)

According to COLOs, the adult undergraduate experience is more uniform than that of traditional-age undergraduates. Over 80% selected "online asynchronous" learning as central to this group today, making it the most dominant single feature across any student group. In comparison, only 70% of COLOs said "physical classroom" was central for traditional-age undergraduates.

Other key elements of the current adult student experience include:

- "Digital course materials" (65%)
- "Mix of online and campus" formats (65%)
- "Physical classroom" (46%)
- "Full-time faculty" and "work experience" (43% each)

This highlights some consistency with how COLOs view the traditional-age undergraduate student experience. As with traditional-age undergraduates, COLOs predict a dramatic rise in AI:

- "AI support services" jumps from 2% today to 51% by 2030.
- "AI tutoring" rises from 2% to 34%.

Some notable differences, however, include:

- "Online synchronous" learning is more critical today among adult learners (25% fundamental vs. only 11% for traditional-age undergraduates) but is forecast to increase in importance for both cohorts.
- "Work experience" is rated much higher for adults than for younger undergraduates (43% vs. 19%) but is expected to slip somewhat, despite the centrality of career to adult motivation.
- "Immersive" stays in single digits (8% vs. 9%), unlike the more marked jump predicted for traditional-age undergraduates (4% vs. 14%). Perhaps COLOs anticipate few adult student-oriented simulations or worry that many adults will struggle with the technology.
- "Self-paced" and "competency-based" learning offer greater promise to COLOs regarding adults, but five-year projections still suggest some hesitation (which likely reflects more experience with these innovations versus the novelty of AI).

Graduate Students: Asynchronous Still Expanding, While AI and Self-Paced Learning Gain Modest Ground

Table 3 presents COLO keyword selections describing the current and anticipated graduate student experience.

**Table 3. Typical Graduate Student Experience: COLO Keyword Selection
(Today & Five Years Out) (Sample = 127)**

Keyword	% Currently Describe	% Five Years Out (percentage point- PP- change)
Online Asynchronous	77%	Up 5 PP (82%)
Full-Time Faculty	64%	Down 23 PP (41%)
Mix of Online & Campus	62%	Down 12 PP (50%)
Digital Course Materials	57%	Up 8 PP (65%)
Online Synchronous	44%	Up 4 PP (48%)
Work Experience	38%	Up 1 PP (39%)
Practitioner Faculty	34%	Down 6 PP (28%)
Physical Classroom	31%	Down 18 PP (13%)
Residential	28%	Down 18 PP (10%)
Seminar	28%	Down 12 PP (16%)
Lecture	24%	Down 15 PP (9%)
Physical Course Materials	11%	Down 9 PP (2%)
Simulations	9%	Up 8 PP (17%)
Self-Paced	9%	Up 6 PP (15%)
Immersive	7%	Up 6 PP (13%)
Competency-Based	7%	Up 17 PP (24%)
Social	5%	Down 2 PP (3%)
AI Support Services	5%	Up 34 PP (39%)
Adaptive Learning	2%	Up 22 PP (24%)
AI Tutoring	2%	Up 19 PP (21%)

As with adult undergraduates, "online asynchronous" learning is the top characteristic of today's graduate student experience. However, graduate students are unique in that COLOs expect this modality to modestly increase in importance over the next five years, from 77% to 82%. This expectation may reflect a perception that graduate students are especially well-suited to independent, flexible learning formats.

"Online synchronous" delivery is also more common for graduate students (44%) than for other student groups and is expected to continue gaining ground (to 48%). Graduate programs may be finding ways to blend live interaction with flexibility to meet the needs of working professionals and advanced learners.

"Digital course materials" and a "mix of online and campus" modalities round out the top four descriptors today, although the latter is projected to decline (from 62% to 50%). COLOs at smaller institutions are more likely to emphasize "online asynchronous" learning, reflecting efforts to enter or grow in the graduate market without investing heavily in hybrid infrastructure.

While "full-time faculty" (64%) and "practitioner faculty" (34%) are central to the graduate student experience, both are expected to decline in perceived prominence over the next five years. This decline suggests a continued shift toward more technology-mediated experiences, including interactions with AI tutors and agents.

COLOs are somewhat more cautious about the role of AI in graduate education than in undergraduate contexts:

- "AI support services" rises from 5% today to 39%.
- "AI tutoring" increases more modestly (from 2% to 21%).
- "Adaptive learning" grows from 2% to 24%.

Other emerging modalities—including "self-paced" learning, "immersive" experiences, "simulations," and "competency-based" education—are also expected to rise, though none are projected to exceed 24% in prevalence. These forecasts mirror the cautious optimism seen at the undergraduate level.

How Do Institutional Type and Mission Shape the Student Experience?

CHLOE 10 examined keyword projections for the student experience at four individual institutions representing four distinct types, including:

- Online Giant
- Public University (R1)
- Liberal Arts College
- Community College

These institutional snapshots provide insight into how mission, scale, and infrastructure influence perspectives on future learning. (Keyword order within each list is not ranked. COLOs selected five keywords without indicating relative importance.)

Table 4. Online Giant: Adult Undergraduates

Characteristic Today	Characteristic in Five Years
Online Asynchronous	Self-Paced
Digital Course Materials	AI Tutoring
Competency-Based Learning	AI Support Services
Practitioner Faculty	Adaptive Learning
Simulations	Competency-Based Learning

This "online giant" envisions a more individualized, AI-driven experience for adult learners. Only "competency-based learning" appears on both lists, suggesting that while some educational fundamentals will endure, most current course and instructional norms will evolve or be replaced. The absence of "simulations" from the five-year outlook may not imply diminished value; instead, it may signal its integration into "adaptive learning" and AI frameworks.

Table 5. Four-Year Public University (R1): Graduate Students

Characteristic Today	Characteristic in Five Years
Physical Classroom	Online Asynchronous
Lecture	Digital Course Materials
Full-Time Faculty	AI Tutoring
Online Asynchronous	AI Support Services
Mix of Online & Campus	Adaptive Learning

This public research university anticipates a gradual but clear shift toward online and AI-enhanced learning, with "physical classrooms," "lectures," and reliance on "full-time faculty" becoming less central. The future student experience here appears modality-diverse, shaped by program and discipline, but more fully mediated by digital resources and intelligent support systems.

Table 6. Four-Year Private Liberal Arts College: Traditional-Age Undergraduates

Characteristic Today	Characteristic in Five Years
Residential	Residential
Physical Classroom	Physical Classroom
Seminar	Seminar
Social	Social
Full-Time Faculty	Full-Time Faculty

Table 6 reminds us that not all COLOs anticipate technology-driven change to the student experience – this traditional liberal arts institution anticipates continuity, not disruption. The same five keywords are selected for both the present and future, underscoring a commitment to tradition, in-person learning, and holistic community experiences. Indeed, the selections are timeless, capturing the liberal arts college experience from decades past. While online and AI tools may support learning behind the scenes, this COLO envisions a future where core liberal arts values remain unchanged.

Table 7. Community College: Traditional-Age Undergraduates

Characteristic Today	Characteristic in Five Years
Lecture	Lecture
Online Asynchronous	Full-Time Faculty
Digital Course Materials	Online Synchronous
Mix of Online & Campus	AI Tutoring
Work Experience	AI Support Services

This profile illustrates the challenge of capturing a diverse, multi-modal student experience with just five keywords. The left-hand column reflects many community college programs' hands-on, skills-based orientation. Though "mix of online & campus" and "work experience" drop out of the future list, this likely reflects keyword selection limits and steady invisibility of standard features, not an actual decline in importance.

Instead, this community college COLO projects a future where AI plays a significant instructional role, and "online synchronous" learning expands to meet evolving needs. Including "full-time faculty" suggests that while AI may replace some adjunct instruction, a core group of human faculty will oversee, guide, and contextualize AI-driven learning. Meanwhile, "lectures" may remain a cost-effective, scalable method of content delivery, supplemented by more personalized technologies.

A "mix of online and campus" will still characterize this college's typical traditional-age student experience five years out, but what takes place in person and what online, and what each looks like, will evolve. "Work experience" will still be necessary, but perhaps a growing portion will be virtualized through AI.

The blended nature of this experience will likely continue, but with changes in where learning happens, how it's facilitated, and who (or what) supports it.

Summary: Online Demand, Modality Trends, and the Evolving Student Experience

Student demand for online learning remains strong—and growing—across all groups. Interest has risen notably among graduate and adult undergraduate students, while traditional-age undergraduates increasingly opt for online courses to accommodate work, housing, and scheduling needs. Although many say they prefer in-person learning, enrollment patterns suggest otherwise (and practicality may trump preference).

Fully asynchronous courses continue to dominate, especially among adult and graduate students, but hybrid and mixed modalities are gaining ground (particularly at the graduate level and among community colleges offering hands-on, workforce-oriented degrees). Nondegree programs remain small in scale but exhibit consistent patterns across student types.

The student experience is shifting from physical classrooms and lectures to AI-enabled and technology-rich models. COLOs predict major declines in residential learning, full-time faculty engagement, and lecture-based instruction, especially for traditional-age undergraduates. In their place, COLOs expect growth in digital materials, AI support services, adaptive learning, and hybrid or self-paced modalities.

While asynchronous delivery remains central, institutions anticipate a more fragmented and personalized future shaped by institutional mission, learner demographics, and strategic readiness. COLOs at larger institutions tend to forecast more aggressive adoption of AI, while smaller and less online-mature institutions show greater optimism about adaptive learning.

Despite variation by sector and scale, one theme is consistent: **The online campus of the future will look different, not only in how learning is delivered, but in who supports it and how students experience it.**

ONLINE PROGRAMS

Projections for Fully Online Programs Show Continued Emphasis and Growth

CHLOE 10 revisits questions first posed in CHLOE 2 (2018) and 3 (2019)[2] , focusing on the extent to which institutions prioritize fully online programs versus courses (across levels of study). As in previous years, responses show clear sector-based distinctions in strategy and emphasis.

Four-year institutions – both public and private – continue to place relatively greater strategic focus on developing fully online programs. Approximately one-fourth of four-year institutions also report wide variation by college or department, reflecting a more decentralized approach to online program development. Sector differences show:

- 36% of COLOs from Private 4Y institutions report prioritizing programs over individual courses, while 26% report a balanced approach, and the same percentage report wide variation.

- 30% of COLOs from Public 4Y institutions report greater emphasis on online programs, while 18% report a balanced approach, and 28% report a wide variation by college or department.

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[2]For CHLOE 2, the survey was administered in 2017, and for CHLOE 3, it was administered in 2018.

- In contrast, only 8% of COLOs from Public 2Y institutions report more emphasis on programs than courses; 72% report greater emphasis on courses, a strategy aligned with their roles in general education and workforce training.

Figure 5 shows the combined percentage of COLOs for each sector who place "somewhat more" or "much more" emphasis on online programs over online courses, comparing CHLOE 10 responses to those from CHLOE 3 and CHLOE 2. While CHLOE 3 showed more emphasis on programs versus courses than other years (especially for Private 4Y), the overall sector trends demonstrate relative consistency over time.

**Figure 5. Sector Trends for Online Program Emphasis
Have Remained Relatively Consistent Over Time
CHLOE 2 (Sample = 182); CHLOE 3 (Sample = 241); CHLOE 10 (Sample = 243)**

Private 4Y
- 2024-25 CHLOE 10: 36%
- 2018-19 CHLOE 3: 44%
- 2016-17 CHLOE 2: 34%

Public 4Y
- 30%
- 35%
- 31%

Public 2Y
- 9%
- 11%
- 7%
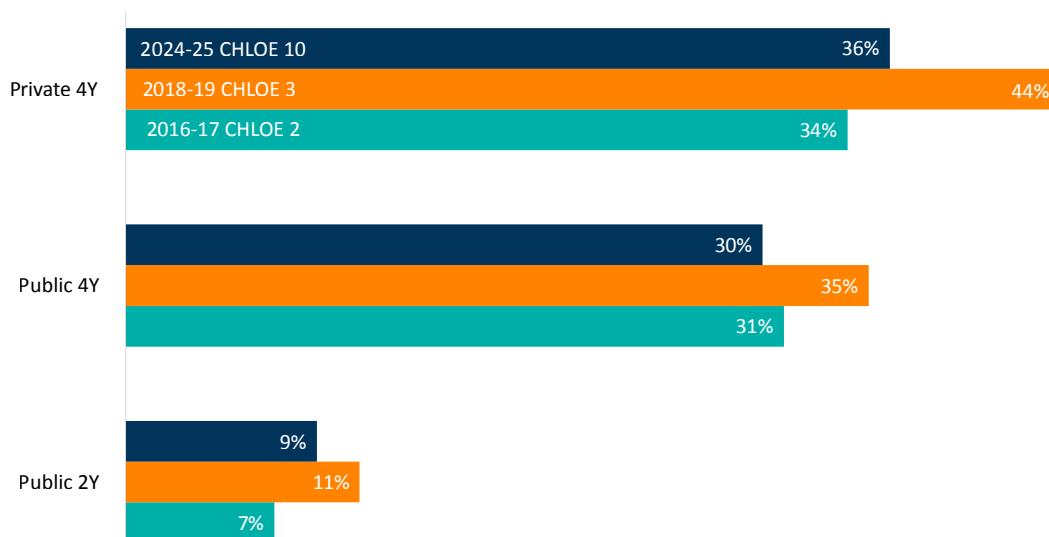
Consistency speaks to enduring institutional characteristics and the appeal of online courses and programs for different audiences and circumstances.

In a follow-up question (also repeated from CHLOE 2), COLOs were asked whether their institutions expected to increase the number of fully online programs (degree and nondegree) in the next three years.

Results indicate a steady growth trajectory, with most institutions anticipating some level of expansion; medium and large-scale growth projections are also higher now than when this question was first asked in 2017:

- 47% expect small-scale growth (1–4 new programs), compared with 65% in CHLOE 2.
- 30% predict medium growth (5–9 programs), compared with 20% in CHLOE 2.
- 11% foresee large-scale growth (10 or more programs), compared with 8% in CHLOE 2.

Figure 6 shows the percentage of COLOs predicting small, medium, and large online program growth, comparing CHLOE 10 responses to those from CHLOE 2.

**Figure 6. Projections for Online Program Expansion
Favor Larger Growth Than in the Past
CHLOE 2 (Sample = 182); CHLOE 10 (Sample = 246)**
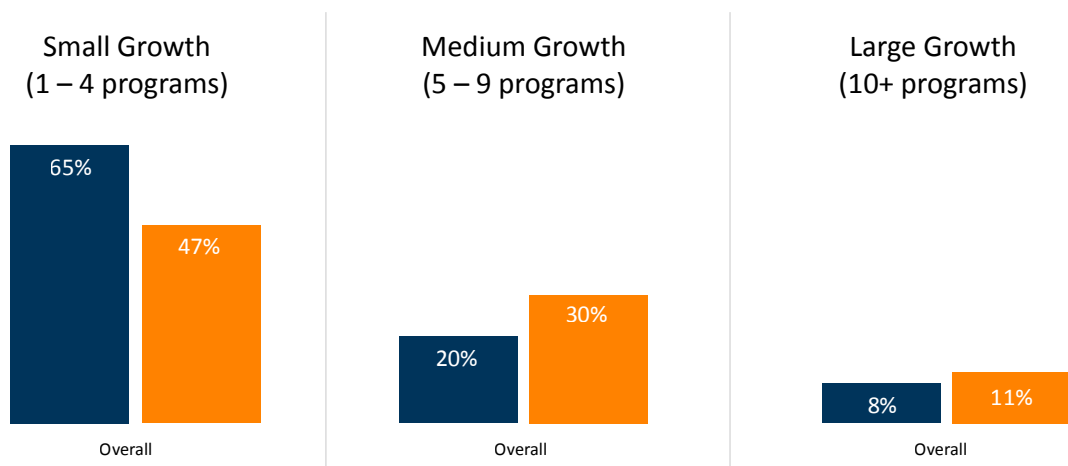
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Sector comparisons reveal distinctions in growth expectations (Figure 7):

- 17% of Public 4Y institutions plan to add 10 or more fully online programs in the next three years (compared with 3% of Private 4Y and 9% of Public 2Y). This sector shows both the strongest projected program growth overall and the broadest distribution across growth categories, reflecting a more varied set of strategies.

- Private 4Y institutions lean toward modest to medium growth (59% small growth; 27% medium growth).

- Public 2Y institutions are most likely to anticipate modest expansion (49% expect small growth; 18% medium growth). It's also notable that 25% of community colleges expect no program growth, suggesting a potential plateau in that sector.

These findings suggest that most institutions continue to build online portfolios incrementally, rather than through rapid expansion. This measured pace likely reflects alignment with institutional priorities, available resources, and sector-specific missions.

Figure 7. Three-Year Projections Show Significant Online Program Growth, but Vary by Sector
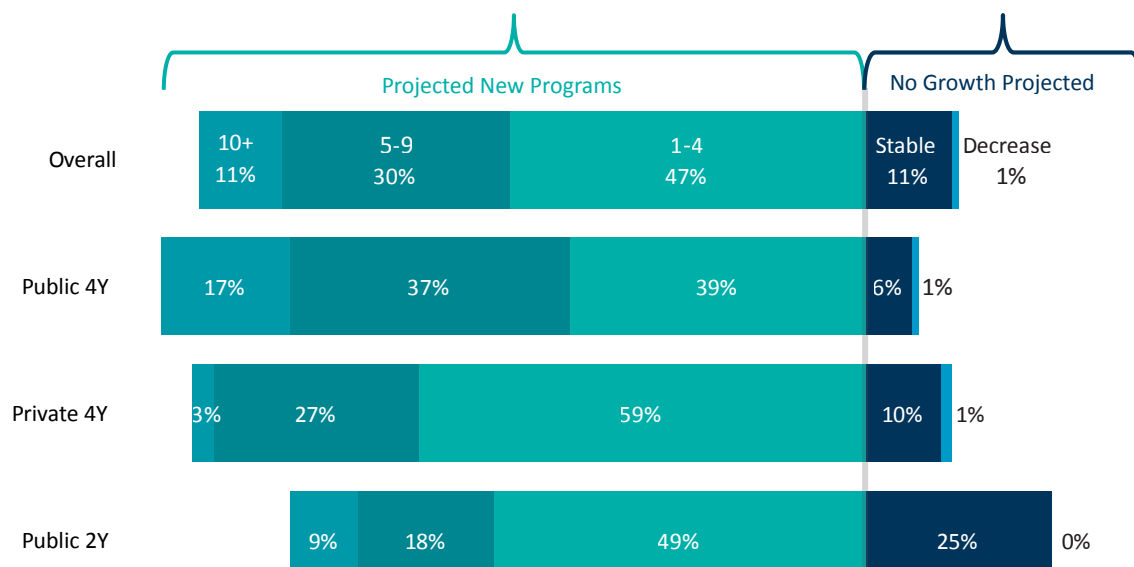
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When analyzed by total online enrollment, a clear correlation emerges: The larger the online student population, the greater the projected growth in online programs.

Among institutions with 7,500+ online students (high-OE):

- 20% expect to add 10 or more programs.
- 38% expect to add 5–9 programs.

Institutions with fewer than 1,000 online students (low-OE) take a more cautious approach:

- 68% anticipate only 1–4 new programs.
- None expect double-digit program growth.

These patterns reinforce the idea that institutions with established online infrastructure are better positioned, and more willing, to scale. In contrast, smaller institutions are more likely to adopt a gradual or exploratory strategy as they grow their online portfolios. Of course, adding a small number of online programs may be highly impactful at a smaller institution.

Further analysis of CHLOE 10 data underscores that public four-year (Public 4Y) institutions – especially those with high-OEs – are leading the most aggressive online program expansion efforts. Of the 88% of COLOs anticipating some online program growth, 29% represent high-OE Public 4Y institutions. Mid-OE institutions (less than 7,500 but more than 1,000 online students) are more evenly distributed across sectors: Public 4Y = 14%; Private 4Y = 17%; Public 2Y = 12%.

It makes sense that larger Public 4Y schools expect to launch a higher number of programs, and that community colleges (the sector with perhaps the most consistent and pervasive exposure to online offerings over the years) exhibit maturation.

These findings suggest that while large online institutions are the primary drivers of growth, a broad cross-section of mid-scale institutions contributes to steady expansion across the landscape.

Market Drivers and Competition: Enrollment Still Leads, but Student Demand and Workforce Needs Are Gaining Ground

Institutions continue to expand their online program offerings, but the motives behind that growth are evolving. While increasing enrollment remains the top driver, selected by 72% of COLOs in CHLOE 10, this marks a decline from 81% in CHLOE 2. At the same time, existing student demand has become more influential, rising from 54% to 65%, suggesting institutions are becoming more responsive to learner preferences.

Interest in meeting industry and workforce needs also grew, while the percentage of COLOs citing revenue growth as a motivator remained stable at 44% (Figure 8).

Figure 8. Increasing Enrollment Still Top Driver for Program Expansion, but Student Demand Gaining Significance
CHLOE 2 (Sample = 182); CHLOE 10 (Sample = 246)

■ 2016-17 (CHLOE 2)   ■ 2024-25 (CHLOE 10)
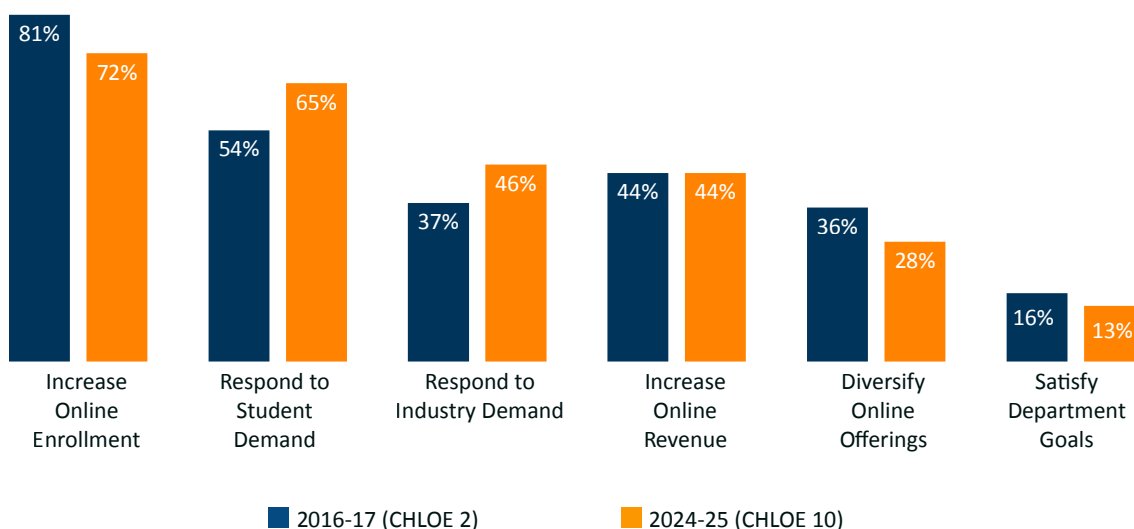
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Sector comparisons highlight differences in strategic emphasis:

- Private 4Y institutions are significantly more likely to cite revenue generation as a key motivator (66%) compared to Public 4Y institutions (45%) or Public 2Y institutions (14%).
- Public 2Y institutions, by contrast, are more likely to emphasize responsiveness to student demand (84%) and diversifying online offerings (37%).

These findings suggest that while revenue remains a steady factor in online program strategy, particularly for private institutions, public institutions are increasingly focused on serving evolving student needs and aligning offerings with regional or workforce priorities.

An Increasingly Competitive Online Program Marketplace

CHLOE 10 asked COLOs to assess how the current online program marketplace compares to the pre-pandemic era—a repeat of a question from CHLOE 2, which used "five years ago" as the benchmark.

Eighty percent of COLOs reported a more competitive online program marketplace, with 4% reporting that it varied widely by program. Some sector differences emerged:

- A high majority (83%) of COLOs from Public 4Y institutions said the market has become "more" or "somewhat more" competitive, compared to 2019/pre-pandemic.
- Private 4Y institutions and community colleges both showed significant increases: 79% of COLOs from Private 4Y institutions cite increased competition (up from 69%), and 74% of COLOs from community colleges said the same (up from 64% in CHLOE 2).

Figure 9 shows the percentages of COLOs, by sector, that reported the online program marketplace to be "more" or "somewhat more" competitive than five years ago, comparing CHLOE 2 data to CHLOE 10. Although a higher majority of COLOs from Public 4Y institutions rate today's marketplace as more competitive, Private 4Y and Public 2Y institutions saw the greatest increase in competition since we asked this question in 2017.

Figure 9. The Online Program Marketplace Is Increasingly Competitive
CHLOE 2 (Sample = 182); CHLOE 10 (Sample = 246)

Sector	2025 CHLOE 10	2018 CHLOE 2
Public 4Y	83%	80%
Private 4Y	79%	69%
Public 2Y	74%	64%

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The sources of competition vary significantly by sector:

- Nearby institutions are seen as primary competitors by 21% of community colleges, 17% of Private 4Y institutions, and only 6% of Public 4Y institutions.
- National competitors are more prominent for 51% of Public 4Y and 41% of Private 4Y institutions.

Public vs. private competition also shows clear splits: 79% of Public 2Y and 71% of Public 4Y institutions identify other public institutions as their main competitors. In contrast, only 46% of Private 4Y institutions report the same.

- Private nonprofit competitors are named by 39% of Private 4Y institutions, but just 11% of Public 4Y institutions, and 0% of community colleges.

Beyond sector-level trends, COLOs described a program-specific and uneven competitive environment. While some programs – particularly in fields like nursing, business (MBA), and education – continue to thrive, others are experiencing stagnation or enrollment decline, even if previously successful.

COLOs cited several contributing factors, including:

- Market saturation, especially in popular program areas
- Geographic density of providers

- Lingering enrollment softness post-pandemic
- An oversupply of similar offerings with limited differentiation

Some institutions reported retaining a competitive edge by offering highly specialized or hybrid programs, while others expressed concern about redundancy and a lack of institutional support for online innovation.

Across the board, the ability to deliver in-demand programs and quality course design stood out as key competitive differentiators. COLO comments included:

> Many of our most successful programs before 2019 have begun to wane in enrollment, but we're not addressing this as we should.

> Some programs have embraced quality online course design, which has made them more competitive in the market. Others have done the opposite, which makes their online programs/courses less competitive.

While the overall landscape remains mixed, the pressure to compete effectively—especially on quality, flexibility, and market alignment—is rising.

Investment in Nondegree and Alternative Credential Pathways: Institutional Engagement with Nondegree Offerings Has More Than Doubled Since 2019

CHLOE 10 revisited a question first asked in CHLOE 3 (2018–19) about institutional investment in nondegree and noncredit programming, including microcredentials, bootcamps, short-term certificates, and other degree alternatives or complements. Respondents could indicate four levels of engagement:

- Major investment
- Some investment
- No investment, but some experimentation
- Interest only

The 2024–25 data shows a dramatic increase in institutional engagement:

- 65% of COLOs now report "some investment" or "major investment," up from 29% in CHLOE 3.
- "Major investment" alone more than quadrupled (from 3% to 15%).
- Institutions reporting "interest only" or "no activity" dropped from 54% to 16%.
- Only 5% of institutions now report "no investment, but some experimentation."

This surge reflects growing recognition that short-format, career-focused offerings can serve new learner populations, supplement traditional degree pathways, and support institutional revenue diversification.

Figure 10 shows levels of investment and non-investment, comparing CHLOE 10 data to CHLOE 3.

**Figure 10. COLOs Report Dramatically Increased Investment in
Nondegree Options Since 2018–19
CHLOE 3 (Sample = 182); CHLOE 10 (Sample = 246)**

Levels of Investment | Levels of Non-Investment

2025 CHLOE 10 (n=244): Major 15% | Some 50% | Experiment Only 20% | Interest Only 11% | Nothing 5%

2019 CHLOE 3 (n=278): 3% | 26% | 17% | 31% | 23%
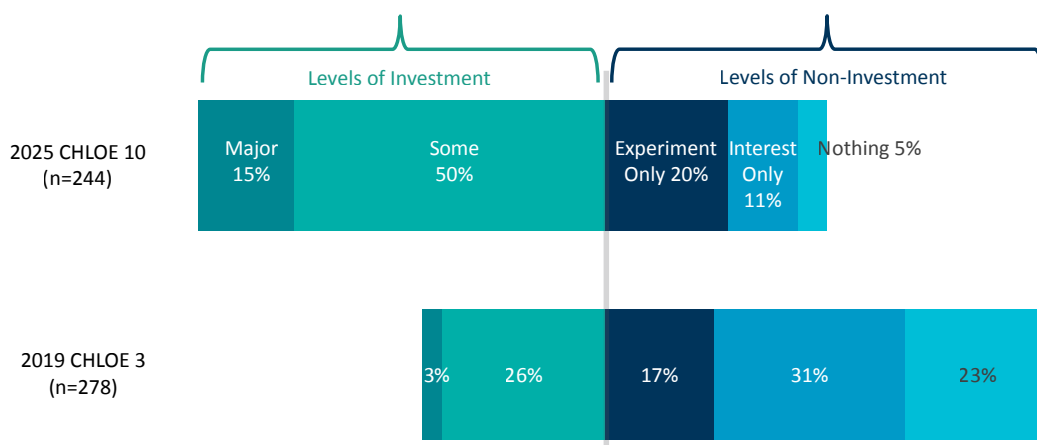
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Sector-level patterns suggest that community colleges are leading this trend. Sixty-nine percent of Public 2Y institutions report investment in nondegree pathways, slightly ahead of Public 4Y (66%) and Private 4Y (64%) institutions. These results align with community colleges' workforce development missions and their experiences delivering short-term, skills-based credentials.

Open-ended comments provide deeper insights into institutional strategies and challenges. Many institutions view nondegree programs as critical for reaching adult learners, displaced workers, and those seeking career advancement through upskilling. Popular formats include stackable certificates, employer-aligned credentials, and badges that articulate to credit. Institutions also experimented with course bundling, competency-based formats, and hybrid designs incorporating online and in-person components. Others use microcredentials as an entry point for underserved learners or a way to enhance graduate and continuing education programs.

Despite the growing investment, COLOs note that implementation is often decentralized or exploratory. Several institutions cited a lack of central coordination, strategic planning, or market validation as barriers to growth. Others reported stalled momentum due to leadership transitions, funding constraints, or uncertain returns on investment. A few expressed skepticism about the long-term value of microcredentials, questioning employer recognition and student awareness.

Online Program Decision-Making: Faculty Still Lead, but Centralization Is Growing

Who determines which programs go online? Media narratives often suggest that central administration is gaining control, focusing on market potential, institutional priorities, and returns on investment. At the same time, faculty are seen as more concerned with disciplinary autonomy or pedagogical preferences.

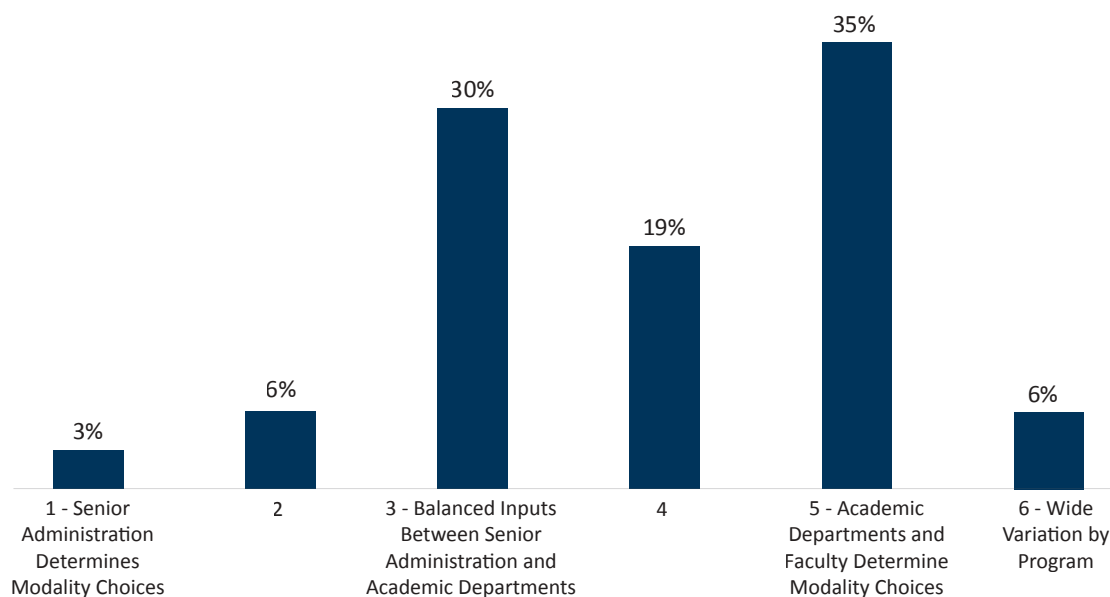CHLOE 10 data tells a different story. Figure 11 displays how COLOs characterize centralized versus decentralized online program decision-making at their institutions. Responses indicate that academic departments and faculty remain the primary decision-makers for online program modality:

- 54% of respondents say departments and faculty lead these decisions.
- Just 9% report that central administration takes the lead.

- 30% describe a shared or balanced approach.
- 6% report wide variation by program.

These findings suggest that, despite increasing strategic and market pressures, academic units still shape the direction of online program development at most institutions. This influence highlights faculty autonomy and the need to align academic and institutional goals.

**Figure 11. Most COLOs See Decentralized Modality Decision-Making
(Sample = 229)**

3%	6%	30%	19%	35%	6%
1 - Senior Administration Determines Modality Choices	2	3 - Balanced Inputs Between Senior Administration and Academic Departments	4	5 - Academic Departments and Faculty Determine Modality Choices	6 - Wide Variation by Program

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COLOs (invited to comment on their answer to this question) call out the advantages of collaboration:

> There has to be a coordinated effort between these two sides if the institution wants to promote a steady and sustainable growth of online initiatives. Support from senior administration is vital for academic departments and faculty to embrace and keep growing online offerings and programs. (Public 2Y, Mid-OE)

Several COLOs pointed to a tradition of shared governance as the best way to make modal decisions. In this vein, one COLO characterized "strategy" as centralized, but "execution" as decentralized:

> [Our] decision-making approach combines centralized strategy with decentralized execution, ensuring that online initiatives align with institutional goals while empowering academic units to shape and refine program offerings. This model fosters innovation, flexibility, and market responsiveness, positioning [us] for continued growth in online education. (Private 4Y, High-OE)

Disagreement on the "right" modalities for particular student types or programs causes problems or random inconsistencies:

> Supportive departments [that] see the value in online may have very different levels of responsiveness compared to academic departments [that] are begrudgingly online. There is definitely a growing belief that students "should" be on-ground and are only choosing online because it's easy/ convenient. Never mind the very real and growing population of nontraditional learners who can only take online classes, and the very real and growing population of traditional-aged learners who prefer online classes; many faculty/deans take a paternalistic, "we know what's best" approach. (Public 4Y, High-OE)

> Colleges vary. For example, in Engineering, they've NEVER wanted or had online offerings. In Business, the faculty want much more online, but the dean feels that students are losing out on important personal and leadership skills. Other colleges vary. We have highly decentralized decision-making. (Public 4Y, High-OE)

Faculty contracts may specify modality decision-making:

> Part of the faculty contract says they get to choose the modality they teach at, and no admins have been able to change that at any negotiations. This means that a single faculty member in a department can stop a program from going online if they don't want to teach online and are required for that program to be online. (Public 4Y, High-OE)

One COLO cited the changing enrollment climate as a catalyst for collaboration: "As the enrollment cliff looms and is taking shape, academic departments seem more interested in collaboratively making these decisions rather than catering to department desires alone." (Public 4Y, R1, High-OE)

In addition to formal structures, the personal styles of institutional leaders, the stance of faculty unions, and system- or state-level coordination all influence who makes decisions about online program modality.

Clear differences emerged by sector:

- Community colleges are most likely to report decentralized decision-making: 49% say faculty and departments lead (Option 5 alone), and 72% select a decentralized or faculty-led approach (Options 4 and 5 combined).
- For four-year public institutions, 40% report faculty-led decisions, and 62% report a decentralized or shared model.
- At Private 4Y institutions, just 16% report faculty-driven decisions, and only 29% choose a decentralized or faculty-weighted model.

One possible explanation is that Public 2Y institutions tend to have leaner central administrations, and the divide between faculty and administrators may be less pronounced. Community colleges also typically offer a narrower programmatic range, which may simplify decision-making about modality.

In contrast, many small Private 4Y institutions may lack the scale that fosters an "us versus them" dynamic. Nearly half (48%) of COLOs at these schools report shared decision-making between faculty and administration. Facing enrollment pressures and limited resources, these institutions may not have the luxury of assigning strategic decisions to only one group.

The level of online enrollment seems to correlate with decentralization. Schools with 7,500+ online students are more likely to report decentralized decision-making: 63% select Options 4 or 5 (i.e., more department and faculty-driven), compared to 52% at mid-sized schools and 27% at institutions with low-OE.

Many high-OE schools reached that scale through a decentralized, department-led approach, where academic units pursued online growth independently, even if a central unit coordinates or provides shared services (such as instructional design or marketing). Still, the rise of online learning typically did not disrupt norms of academic-level decision-making.

When asked about trends over time, COLOs expressed mixed views:

- 35% say central administration is gaining influence.
- 24% say faculty influence is growing.
- 41% report no change.

Sector differences were minor, but schools with high-OE were more likely to report growing centralization (41%) compared to only 27% at low-OE institutions. This shift may reflect pressures related to the "demographic cliff," revenue targets, or institutional strategy, prompting administrators to take a more active role in program planning.

Open-ended comments suggest that central control is often uneven or context-dependent:

- Central control can vary by academic level: Some COLOs report that senior administration assumes greater control over online graduate programs to take advantage of market-based tuition and superior profit margins.

- Central administration may intervene to further a specific objective, such as a desire to create a fully online bachelor's completion pathway (when faculty priorities are said to lie elsewhere).

- A few COLOs described tentative or symbolic gestures toward centralization, such as commissioning internal reports on online strategy that never lead to implementation.

Online Program Revenue Distribution: Models Reflect Institutional Priorities— and Shape Future Online Growth

The final part of this section explores how tuition and fee revenue from online programs is distributed within institutions, which units receive a share, and how COLOs perceive the effectiveness of different revenue models. The goal is to better understand online program revenue's internal and external flow, such as to central administration, academic departments, or online program management (OPM) providers, and its potential impact on decision-making and strategy.

Revenue distribution is closely linked to modality decision-making (as discussed earlier). Whether a campus unit directly benefits from online program revenue may influence its support for expanding online offerings.

Figure 12 shows how COLOs responded when asked whether specific entities at their institutions receive a share of this revenue.

Figure 12. Central Administration Is Most Likely to Receive Online Program Revenue (Sample = 212)
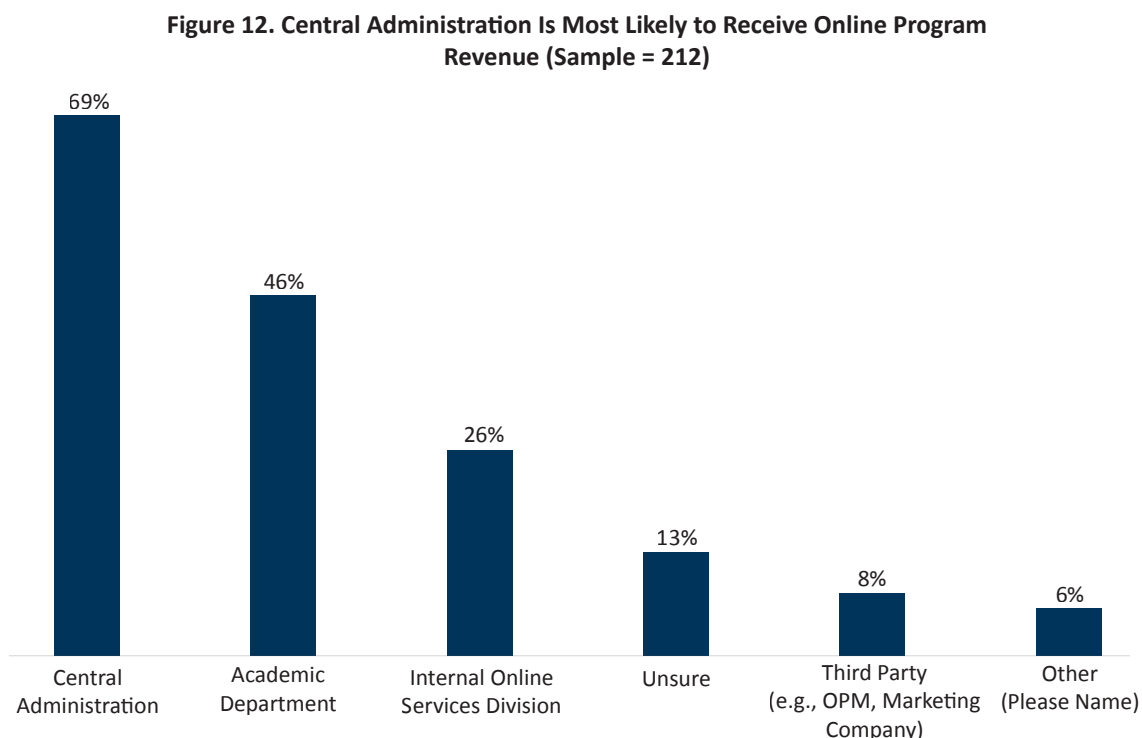
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Nearly 70% of COLOs say "central administration" receives at least some online program revenue. Almost half say the same of "academic departments." Only one-quarter report that their "internal online services division" receives such revenue. Just 8% report revenue going to OPMs or third-party providers, though this figure likely underrepresents OPM involvement, as the survey asked only about revenue-sharing, not fee-for-service arrangements. The OPM share was higher among schools that answered based on their largest online programs (19%).

Some COLOs stressed that online program revenue is treated like all other tuition and fee revenue: pooled centrally for general distribution. Moreover, some found the "central administration" category too narrow, pointing to revenue distribution to various distinct central services (e.g., plant maintenance, instruction, athletics). At the other end of the spectrum, some institutions use a form of decentralized budget management (e.g., Responsibility Center Management (RCM)), designed to encourage academic units to innovate in exchange for control over revenue generated. "Other" responses tend to reference one or another of these circumstances.

Several COLOs pointed out that tuition and fees often follow different distribution rules. For instance, dedicated online program fees may be allocated differently than tuition, complicating the combined view of revenue sought by the CHLOE 10 Survey.

High-OE schools are more likely to report "central administration" as recipients (80% vs. only 50% at low-OE schools). Enrollment scale drives the provision of central services, which impacts revenue flows. At institutions with few online programs, the ability to retain most or all revenue can affect how faculty and academic leaders view online expansion. Generally, as online programs scale, more recipients enter the revenue stream. Yet even among high-volume institutions, centralized distribution remains common.

Uncertainty about revenue flows is most pronounced at low-OE schools (27%), and lowest at high-OE schools (7%).

Sector differences also emerged:

- Public and private four-year institutions are most likely to report distribution to "academic departments" (54% and 51%, respectively).
- Community colleges are least likely to do so (25%).
- Public 4Y institutions are most likely to share revenue with online services units (39%), while Private 4Y institutions are least likely (11%).
- Distribution to "central administration" is most common at Public 4Y institutions (79%).

In terms of revenue concentration, over 40% of COLOs report that a single entity receives all online tuition and fee revenue, most commonly the "central administration" (34%), followed by "academic departments" (7%) and online services units (2%). However, most of the sample (57%) points to multiple recipients.

Online Program Revenue by Sector

The following figures illustrate how institutions distribute online program revenue among multiple recipients, segmented by sector: first, Public 2Y colleges, then Public 4Y universities, and finally, Private 4Y institutions. The goal is to highlight the diversity of revenue-sharing arrangements within each sector.

Community Colleges

Two-thirds of COLOs report a single recipient for online tuition and fee revenue—a much higher ratio than the overall sample (67% vs. 43%). The remaining third, shown in Figure 13, follows various multi-recipient models dominated by combinations of academic departments, internal service units, and central administration. Only one school in this sector reported revenue going to a third-party provider.

Within this sector, there is no clear relationship between online enrollment scale and the likelihood of centralized revenue distribution. Instead, model variation appears to be shaped more by local factors such as leadership, governance, and institutional culture.

Excluded from Figure 13 are 18 Public 2Y schools with 100% online program revenue distribution to central administration, two with 100% to academic departments, two with 100% to internal online service divisions, and three with 100% to "Other."

**Figure 13. Public 2Y Schools with Multiple-Recipient Online Program
Revenue Distribution**
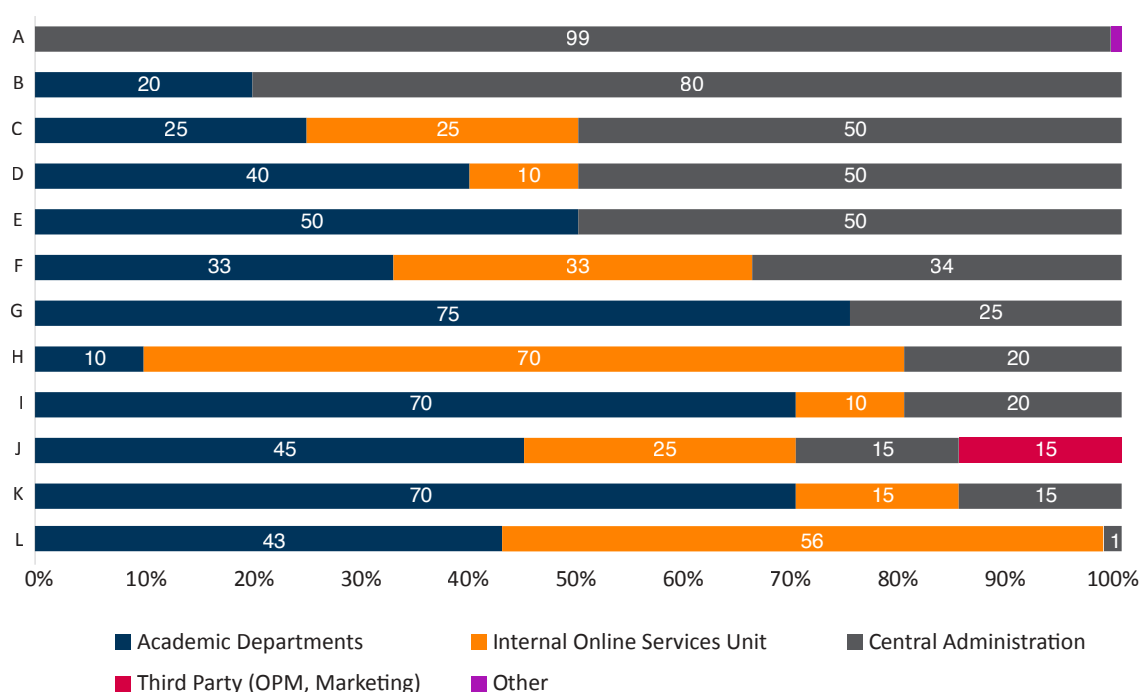
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Public Four-Year Institutions

The CHLOE 10 sample includes 58 Public 4Y institutions with multi-recipient revenue models—too many to display clearly in a figure. This count excludes 23 schools reporting 100% distribution to central administration, one to academic departments, one to an internal service division, and two to "Other."

Public 4Y schools exhibit a much lower single-recipient ratio: 32% compared to 67% for their two-year counterparts. This lower ratio is consistent with greater institutional scale and complexity, more program variety, and a marked distinction between faculty and administration. There is a modest association between higher online enrollment and multiple-recipient revenue models among this school type.

At a few Public 4Y institutions in the sample, revenue flows to third parties are significant.
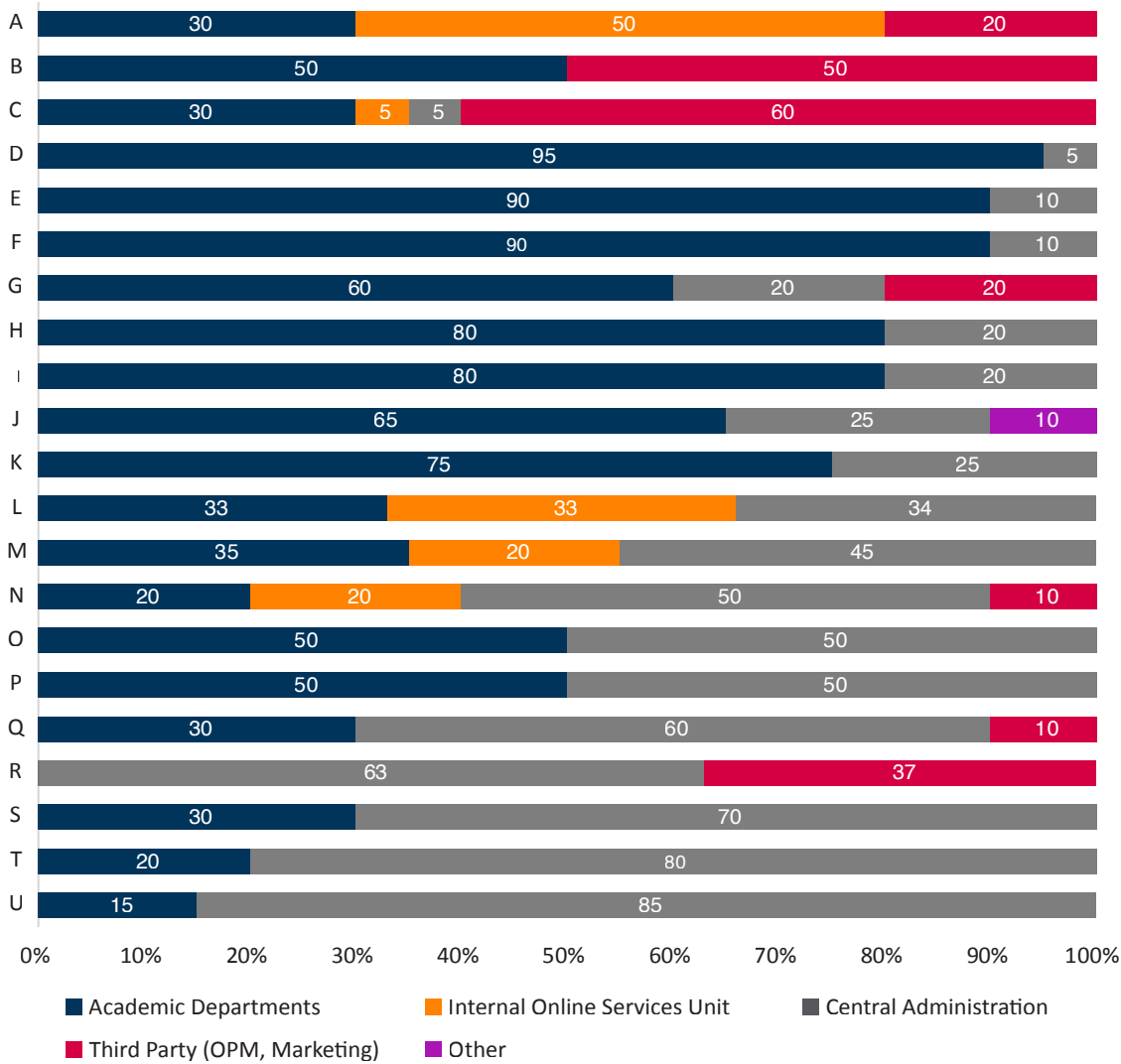
Private Four-Year Institutions

Among Private 4Y institutions with available data, 54% use single-recipient models, placing them between community colleges (67%) and Public 4Y institutions (32%). This range reflects the diversity of private institutions, from large universities to small, specialized colleges.

This group found no correlation between online enrollment scale and revenue recipient count. Two schools report that half or more of their online program revenue goes to a third-party partner.

Excluded from Figure 14 are 16 Private 4Y schools reporting 100% of online revenue going to central administration, eight to academic departments, and one to an internal service division.

Figure 14. 21 Private 4Y Schools with Multiple-Recipient Online Program Revenue Distribution

School	Academic Departments	Internal Online Services Unit	Central Administration	Third Party (OPM, Marketing)	Other
A	30	50		20	
B	50			50	
C	30	5	5	60	
D	95		5		
E	90		10		
F	90		10		
G	60		20	20	
H	80		20		
I	80		20		
J	65		25		10
K	75		25		
L	33	33	34		
M	35	20	45		
N	20	20	50	10	
O	50		50		
P	50		50		
Q	30		60	10	
R			63	37	
S	30		70		
T	20		80		
U	15		85		

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COLO Satisfaction with Revenue Distribution Models

Only 37% of COLOs say their institution's online program revenue-sharing models work well (Figure 15). An additional 20% reported that changes were being considered, while another 20% expressed dissatisfaction but noted that no reforms were underway. The remaining 25% say they're unsure, perhaps indicating that existing models function more as informal norms than deliberate strategies.

Figure 15. The Majority of COLOs Are Dissatisfied with Online Revenue Arrangements or Are Unsure (Sample = 228)
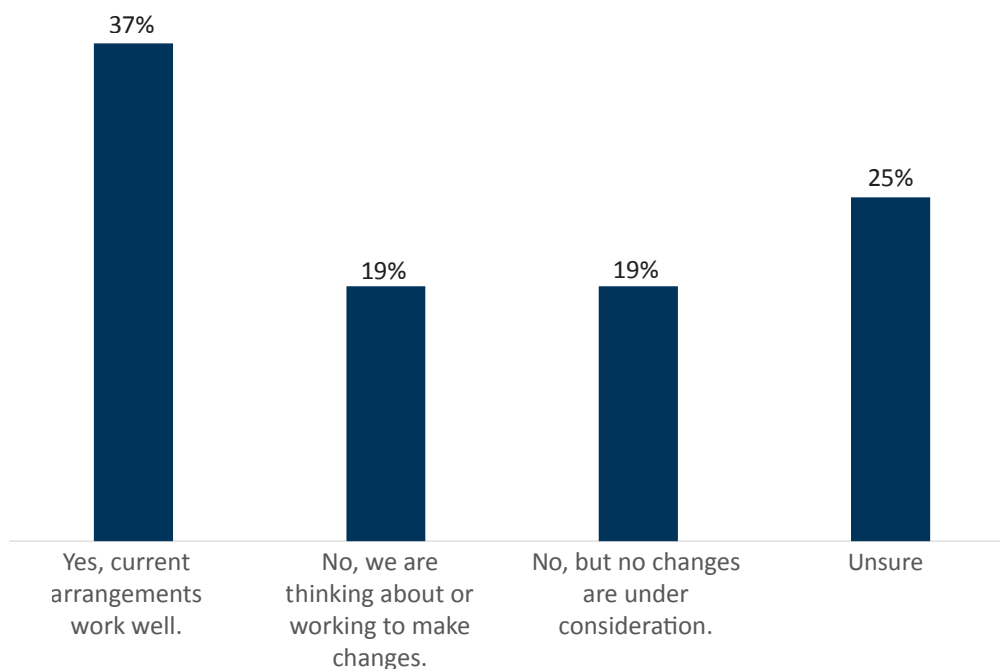
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Sector and enrollment scale differences are modest. Community colleges are most likely to report satisfaction (45%) and least likely to say reforms are being discussed (6%). This satisfaction aligns with their more centralized operations, narrower missions, and regionally focused markets.

There is some association between higher COLO satisfaction and models that balance revenue distribution between central administration and academic departments. Models favoring academic departments tend to correspond with lower COLO satisfaction and more uncertainty.

Revenue-sharing approaches involving departments and administration – sometimes including internal services units – may be viewed as more equitable and conducive to collaboration. By contrast, department-dominated models may reduce transparency and create inconsistency. On the other hand, centralized models may offer clarity and simplicity, with the expectation that revenue will subsequently flow to departments.

These findings, though, should be interpreted with caution due to limited sample sizes.

Ultimately, no single revenue-sharing model is universally "correct." Execution and alignment with institutional priorities often matter more than structure alone.

Incentives Matter: How Revenue Flows Shape Online Program Strategy

The final question in this part of the survey asked about the extent to which current online program revenue distribution models encouraged specific outcomes. Figure 16 compares COLO responses to two statements:

1. "Incentivize academic departments to boost online enrollment and revenue."

2. "Fund valuable internal services."

As shown in Figure 16, COLOs at institutions where all or most online program revenue flows to academic departments are significantly more likely to believe the model incentivizes enrollment and revenue growth. In contrast, COLOs at institutions where all revenue flows to central administration are more likely to disagree. Though less pronounced, the reverse pattern is evident in responses about the ability to fund internal online support services.

**Figure 16. COLO Perspectives on Online Program Revenue Distribution
Model Impact (% Strongly Agree/Agree) (Sample = 223)**
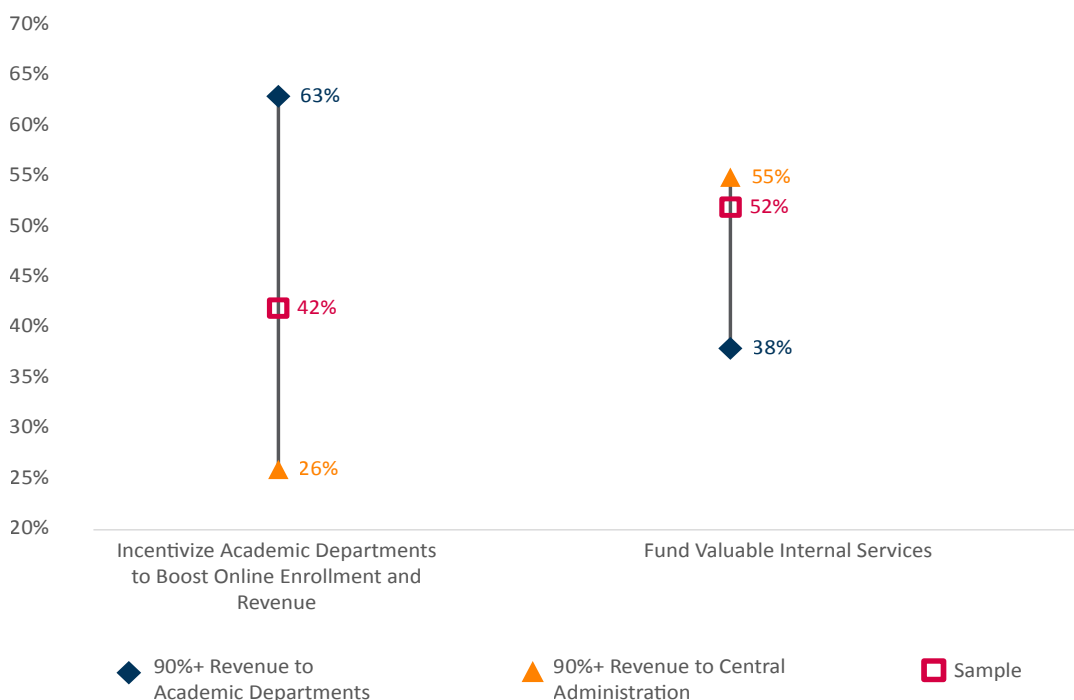
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When isolating "balanced" institutions (not shown in Figure 16), where academic departments and central administration receive between 30% and 60% of online program revenue, agreement rates are 63% for incentivizing enrollment and 79% for funding internal services.

While sub-samples are small, the data suggests that revenue-sharing models involving academic units and central administration are associated with multiple perceived benefits.

Summary: Online Programs

Fully online programs remain central to digital-learning strategies, especially at four-year institutions. Roughly 30% of four-year institutions place greater emphasis on programs than on stand-alone courses, although about one-quarter report that priority varies widely by department. By contrast, nearly three-quarters of community colleges remain focused on individual online courses. Growth expectations point to steady, targeted expansion: Almost half of COLOs plan to add one to four new fully online programs within the next three years, with relatively few institutions pursuing large-scale rollouts. The most ambitious scaling is concentrated among public four-year universities that already enroll high numbers of online students.

Enrollment growth remains the primary motivation for online program expansion, though its dominance has diminished since earlier CHLOE reports. Demand from existing students has become a more prominent driver, suggesting growing alignment between institutional offerings and learner expectations. Revenue remains a key consideration, especially for Private 4Y institutions, while Public 2Y colleges emphasize meeting student needs and expanding workforce-aligned programming.

Market competition has intensified across sectors. Private 4Y institutions and community colleges report growing competition from regional and nonprofit peers. In contrast, Public 4Y schools view the marketplace nationally and identify other public institutions as their primary rivals. Institutions with strong program design, hybrid flexibility, and differentiated offerings are perceived as better positioned to compete in a crowded marketplace.

Investment in nondegree and alternative credential programs has surged. Two-thirds of institutions now report some or significant investment in offerings such as certificates, microcredentials, bootcamps, and badges that articulate to credit. This number marks a significant shift from CHLOE 3, when fewer than 30% reported any investment. Community colleges are leading the charge, but investment is widespread across sectors.

While online program strategy is increasingly central to institutional planning, decisions about which programs go online are still primarily made at the academic department level. Fifty-four percent of COLOs report decentralized or faculty-led modality decisions, compared to just 9% indicating central administrative control. However, many institutions, especially those with high-OE, report a shift toward greater administrative influence. Decision-making remains shaped by local context, leadership style, shared governance structures, and faculty contracts.

Revenue distribution models vary widely. Nearly 70% of institutions report that central administration receives some share of online tuition and fee revenue, while almost half say the same for academic departments. Distribution to internal online services divisions is less common. Public 4Y institutions are most likely to report multi-recipient models, while community colleges use single-recipient approaches. Fewer than 40% of COLOs are satisfied with their institution's current revenue model. Models that balance revenue between departments and central units are perceived as better at incentivizing enrollment growth and funding support services.

This section reflects increasing institutional sophistication in online program planning, tempered by pragmatic growth strategies and continued internal variation in decision-making and resource allocation. A central reality is emerging despite institutional differences: **Online program strategy is increasingly driven by external pressures, from heightened competition to demographic shifts, demanding deliberate strategy and cross-campus collaboration.**

ONLINE READINESS: STUDENT SUPPORT, FACULTY TRAINING, AND INSTITUTIONAL PREPAREDNESS

Online Learner Support Services

CHLOE 6, released in 2021 during the height of the pandemic's emergency shift to remote learning, examined the availability of student services that could be accessed without coming to campus. The goal was to assess how institutions supported student readiness and success in remote and online environments. At the time, several services were underdeveloped, including accessibility support, mental health services, career counseling, and opportunities for student engagement through online clubs and organizations.

COLOs were asked to classify each support area into one of three categories: "in place and working well," "in place but needs enhancement," or "not in place" (a composite of "under development," "future priority," and "not a priority," due to low individual response rates). CHLOE 10 repeated the question

nearly four years later to assess institutional progress. While improvements were evident in several areas, other services showed little or no follow-through despite earlier prioritization.

Most categories of online learner support showed growth in the "in place and working well" category:

- "Accessibility services" had the most significant gains: Only 32% of COLOs rated them as "in place and working well" in CHLOE 6, compared to 52% in CHLOE 10. Reports of these services needing enhancement declined from 52% to 43%.

- Other areas of improvement included "academic advising," "admissions," "financial aid," and "mental health services."

- More modest gains were seen in "library services" (which already functioned well in most institutions), "technical support," and "writing centers."

While CHLOE 10 disaggregated tutoring into "math" and "writing," making direct comparisons to earlier data more difficult, math tutoring services currently appear to lag slightly behind writing support. Low-OE institutions reported the weakest support for math and writing tutoring, with only 29% reporting these services as "in place and working well" compared to most mid- and high-enrollment peers. CHLOE 10 also introduced a new category, "career planning," with 39% of COLOs reporting it as "in place and working well," while nearly half (48%) said it still needs enhancement.

Student clubs and organizations saw a notable decline in support, dropping from 20% in CHLOE 6 to just 15% in CHLOE 10. This is especially striking given that, in CHLOE 6, 47% of COLOs had already identified these services as needing improvement, with another 24% naming them as "under development" or a "future priority." The CHLOE 10 findings suggest that institutional follow-through in this area has stalled — or even regressed. Currently, 38% report online student organizations as "in place but needs enhancement," 17% say they are "under development," and 14% identify them as a "future priority." This limited progress raises concerns about institutional commitment to fostering online student engagement, community, and belonging.

Figure 17 shows COLO responses for online student services that are "in place and working well," comparing CHLOE 10 data with CHLOE 6.

Figure 17. Most 'In-Place & Working Well' Online Student Services Show Improvement from the Remote Learning Era
CHLOE 10: Sample = 248-252; CHLOE 6: Sample = 327

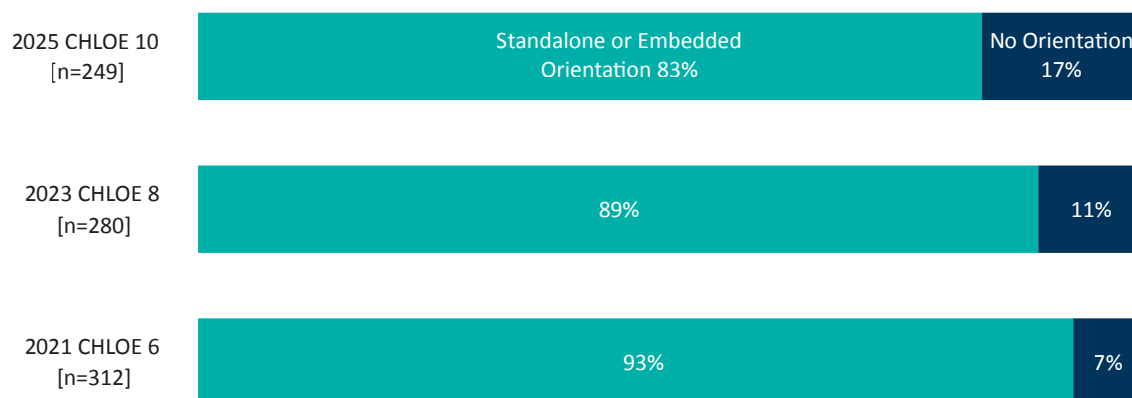*Asked as General Tutoring in CHLOE 6   ^Not asked in CHLOE 6
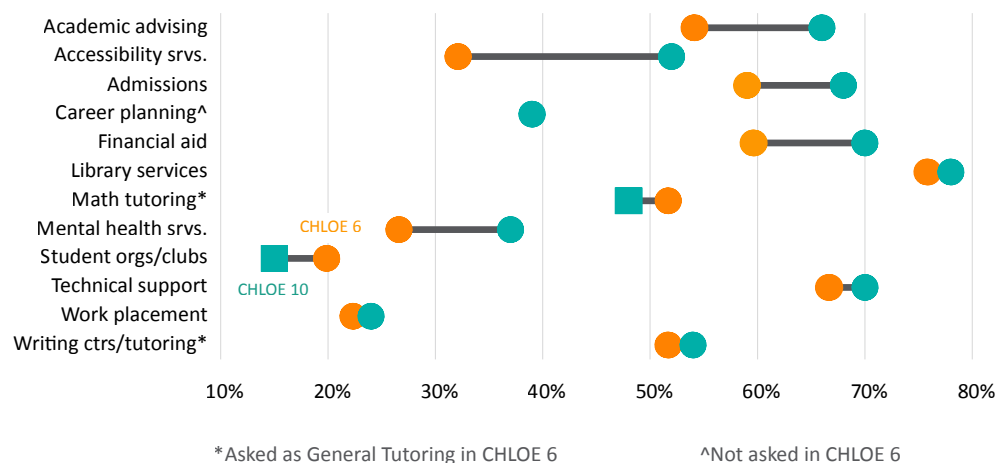
Online Learner Readiness

Online student success depends partly on preparation for the modality's demands, including self-directed learning, time management, digital communication, and technology use. The CHLOE Project has consistently tracked institutional efforts to support this preparation, particularly through online orientations. These orientations take various forms, including both standalone modules and embedded content within general or course-specific orientations, and in optional or required formats.

During the early pandemic, requiring an online-specific orientation was considered critical for student readiness. However, this is one area where institutions appear to have regressed.

In CHLOE 6 (2021), nearly all institutions (93%) reported offering a "standalone or embedded online orientation." That figure declined to 89% in CHLOE 8 (2023) and now stands at 83% in CHLOE 10 (Figure 18). One possible explanation is the perception that online learning has become so commonplace that formal orientation is no longer needed. However, anecdotal evidence and open-ended responses from COLOs suggest otherwise, indicating that many students still arrive underprepared for success in online environments. The assumption that students no longer need orientation mirrors earlier misconceptions about "digital natives."

**Figure 18. Most Institutions Offer an Online-Specific
Student Orientation, but the Ratio Continues to Decline
CHLOE 6: Sample = 312; CHLOE 8: Sample = 280; CHLOE 10: Sample = 249**

2025 CHLOE 10 [n=249]	Standalone or Embedded Orientation 83%	No Orientation 17%
2023 CHLOE 8 [n=280]	89%	11%
2021 CHLOE 6 [n=312]	93%	7%

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At the same time, for those who do offer an online-specific orientation, CHLOE 10 shows a steady rise in institutions requiring it. In CHLOE 6, only 35% of institutions reported requiring online orientation, which increased to 43% in CHLOE 10. Although progress is evident, most institutions still do not mandate orientation for online learners, potentially leaving students underprepared for online coursework or future shifts to remote instruction.

Open-ended comments reflect a wide variation in orientation practices and ongoing experimentation:

- Some institutions require orientation for all students, particularly in fully online or graduate programs.
- Others offer it as optional, leaving implementation to departments, programs, or individual instructors.
- Several institutions embed orientation content or readiness assessments in the LMS, while others rely on program-specific resources or informal materials.

Orientation delivery is also evolving. Institutions increasingly incorporate asynchronous modules, live Zoom sessions, digital handbooks, and standalone readiness courses. COLOs highlighted the importance of an orientation for building digital literacy, time management, and academic success strategies specific to online learning. However, some noted stalled efforts or lack of coordination, with institutional priorities not always reflected in practice.

Online Teaching: Distribution and Faculty Readiness

CHLOE 10 examined faculty readiness for online instruction, focusing on who teaches online and how well prepared they are to design and deliver quality online courses. These insights shed light on the current capacity for quality online delivery and institutional ability to respond to future disruptions.
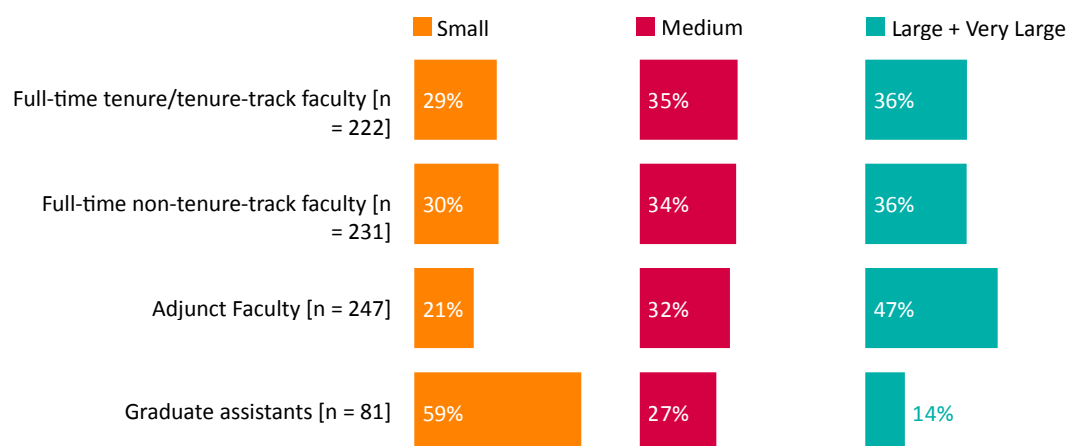
Who Is Teaching Online?

COLOs were asked to report how online teaching is distributed among four categories of instructional staff:

- Full-time tenure/tenure-track faculty
- Full-time non-tenure-track faculty
- Adjunct faculty
- Graduate assistants

Each group was classified based on the proportion of their involvement in online teaching: Small (1–25%), Medium (26–50%), or Large + Very Large (51% or more).

While all instructional staff participate in online delivery, adjuncts are disproportionately responsible for online course loads. Nearly half (47%) of COLOs report that adjuncts fall into the "large + very large" category of online teaching distribution, underscoring the responsibility of institutions to provide consistent training, support, and inclusion in quality-assurance efforts. Full-time faculty, both tenure-track and not, showed a relatively equal distribution. Graduate assistants are least likely to teach online, with nearly 60% classified in the "small" category (Figure 19).

Figure 19. Distribution of Online Teaching by Instructor Type Shows Adjuncts Have the Largest Share (Sample = 81–247)

	Small	Medium	Large + Very Large
Full-time tenure/tenure-track faculty [n = 222]	29%	35%	36%
Full-time non-tenure-track faculty [n = 231]	30%	34%	36%
Adjunct Faculty [n = 247]	21%	32%	47%
Graduate assistants [n = 81]	59%	27%	14%

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Are Faculty Ready for Online Instruction—and Future Disruptions?

To assess faculty preparedness, CHLOE 10 asked COLOs to evaluate readiness in three areas:

- Designing online courses
- Teaching online courses
- Using the LMS

Each was rated as "fully prepared," "working to improve," "not working to improve," or "unprepared."

The results show a mixed picture. A majority of institutions report that faculty are "fully prepared" to use the LMS (55%), but fewer say the same about teaching online (45%), and even fewer about online course design (28%). Encouragingly, many COLOs report "working to improve" faculty support in all three areas, particularly in design.

Still, one in four institutions reports that faculty remain "unprepared" or "not working to improve" in online course design, raising concerns amid growing institutional reliance on online modalities and the potential for future shifts to remote instruction (Figure 20).

**Figure 20. Many Faculty Are Not Prepared for Online Learning, but
Institutions Are Working to Improve (Sample = 245–247)**
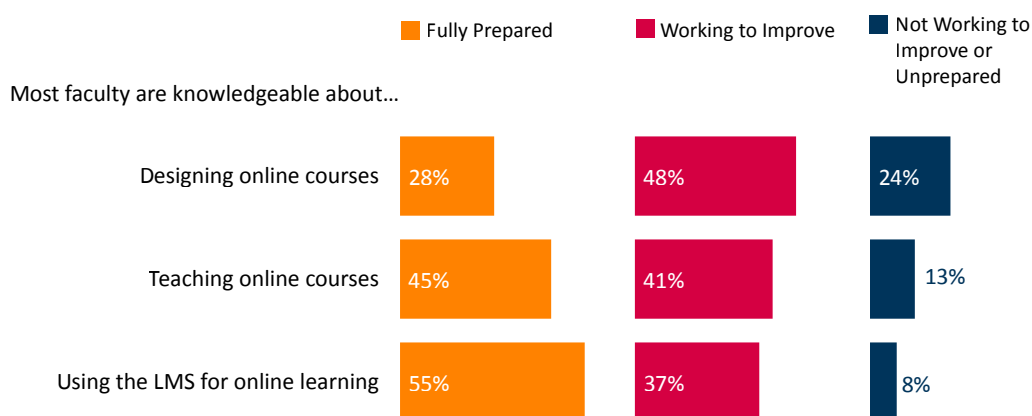
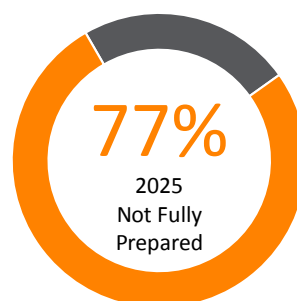*© Eduventures Research, Quality Matters, and EDUCAUSE 2025*

Looking back to CHLOE 5 (May 2020), 75% of COLOs reported that campus-based faculty were not fully prepared for the sudden pivot to remote learning. While not directly comparable, current data on faculty readiness across design, teaching, and LMS use (re-coded as a single variable) suggests little progress since that time (Figure 21). This persistent gap suggests that institutions may be overlooking a key area in terms of both online scalability and crisis readiness.

Figure 21. COLO Perceptions Show Faculty Preparedness for Online Learning Has Stagnated (Sample = 249)

In 2020, faculty were not fully prepared for the challenges around moving to remote learning.

75%
2020
Not Fully
Prepared
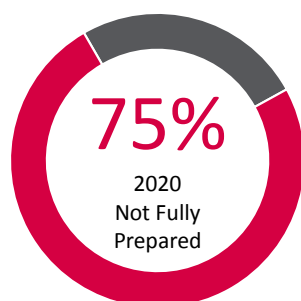
Today, faculty preparedness for future rapid pivots to remote learning remains at similar levels.

77%
2025
Not Fully
Prepared

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These findings echo those in the student orientation and support sections. While many institutions are making incremental progress in faculty training and support, few are scaling these efforts to match institutional growth or ensure academic continuity in a future emergency. As one COLO noted, "Institutions may have the infrastructure to pivot online, but without consistent faculty training and updated emergency plans, quality and continuity remain at risk."
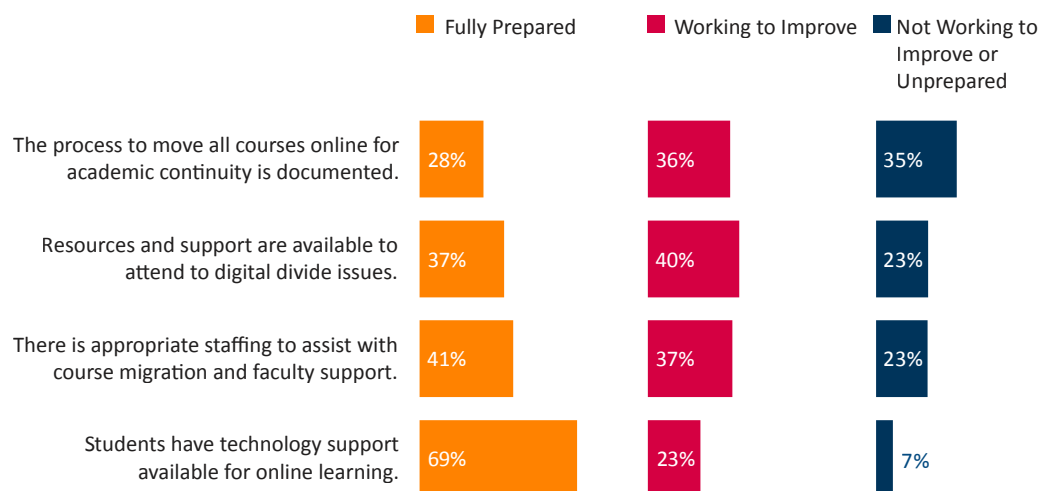
Institutional Preparedness for Online

The disparity in faculty preparedness has significant implications for future online growth and institutional resilience during emergencies requiring rapid shifts to remote instruction. Recent events, such as Hurricane Helene and campus protests, highlight the urgency of this issue. As one COLO respondent said, "The ability to swiftly transition to online instruction during emergencies hinges on faculty preparedness—a lesson underscored by recent campus disruptions."

To assess broader institutional preparedness, CHLOE 10 asked COLOs about existing policies and procedures to support future emergency pivots and academic continuity. Academic continuity is a critical element of any institution's Emergency Operations Plan (EOP) and should outline how the institution will sustain its core educational mission before, during, and after a disruption, minimizing interruptions to teaching and learning. Breaks in academic continuity can lead to serious consequences for students, including delayed graduation, academic setbacks, and financial hardship. An effective continuity plan must ensure that all students—including those from underserved or vulnerable populations—can maintain access to coursework.

Using the same three-tier rating scale as in the faculty preparedness section, COLOs were asked to evaluate their institutions' preparedness across several key areas: student technology support, instructional continuity planning, and faculty support for rapid course migration.

The data presents a mixed picture. While many institutions have maintained infrastructure built during the COVID-19 pandemic, few report full preparedness across all areas of emergency response. As shown in Figure 22, student technology support was the most developed area, with 69% of institutions indicating full preparedness.

Figure 22. Institutional Preparedness for Academic Continuity Is Lacking (Sample = 245–247)

Legend: ■ Fully Prepared ■ Working to Improve ■ Not Working to Improve or Unprepared

	Fully Prepared	Working to Improve	Not Working to Improve or Unprepared
The process to move all courses online for academic continuity is documented.	28%	36%	35%
Resources and support are available to attend to digital divide issues.	37%	40%	23%
There is appropriate staffing to assist with course migration and faculty support.	41%	37%	23%
Students have technology support available for online learning.	69%	23%	7%

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Other areas reveal greater vulnerability:

- Less than half (41%) of institutions report appropriate staffing to support faculty with rapid course migration. While 37% are "working to improve" in this area, that goal may be limited due to recent budget constraints.

- Addressing the digital divide remains a persistent challenge, with only 37% of institutions rating themselves as "fully prepared" to meet students' needs (the digital divide will be examined in greater detail in the following section).

- Even though nearly all institutions shifted to emergency remote learning just four years ago, only 28% are "fully prepared" with documented academic continuity plans.

Open-ended comments revealed a poor institutional memory of the pandemic period, with a "we did it once, we can do it again" attitude or a "one-and-done" mentality, believing that another emergency pivot is unlikely. However, other institutions recognize that codified academic continuity plans are fundamental to overall institutional preparedness. As one COLO shared,

> Once the COVID-19 pandemic began to recede, many people returned to 'business-as-usual' thinking. However, in Fall 2024, we began to dust off the old playbook and develop an evergreen guide for instructional continuity for disruptions of all kinds. That updated guidance is going through the governance processes this year.

Qualitative responses further illustrate the wide range of institutional approaches. Some colleges and universities actively update and test formal "keep teaching" plans, while others admit that preparedness efforts have lost momentum. Commonly cited barriers to sustained planning include budget constraints, staffing reductions, and leadership turnover.

CHLOE 10 findings suggest that while many institutions could manage a short-term shift to remote instruction, long-term continuity and maintaining instructional quality during extended disruptions require more planning, sustained investment, and leadership commitment.

The Digital Divide

Most COLOs acknowledge that the digital divide affects their online learners, though the degree of impact varies (Figure 23):

- 88% said it affects at least some students (65% reported that it affects some online students, 21% said it affects many, and 2% said it affects all students).

- Just 5% of respondents said the digital divide was not an issue at their institutions.

- Another 6% were unsure, perhaps indicating an awareness gap.

**Figure 23. Most COLOs Say the Digital Divide Affects Online Students
(Sample = 226)**
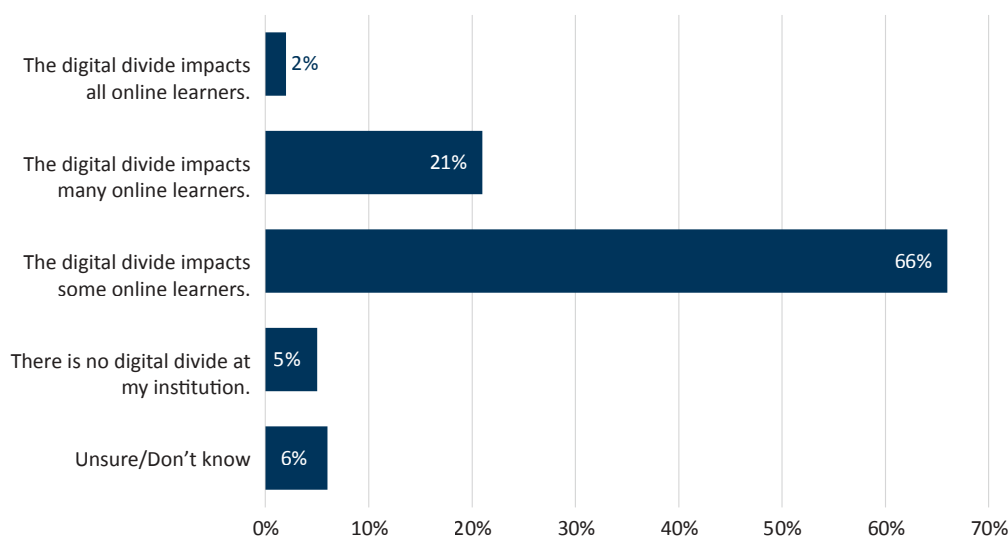
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Institution size and sector appear to influence perceptions of the divide's scope:

- Institutions with larger online student populations are more likely to report that many students are affected: 23% of institutions with more than 1,000 online learners reported this compared to 8% of those with fewer than 1,000.

- At Public 2Y institutions, 38% of COLOs said the digital divide affects many students compared to just 11% at Private 4Y institutions and 19% at Public 4Y institutions.

- Notably, 0% of community college COLOs said the divide was nonexistent. Resource limitations and restricted state funding may help explain these disparities.

Respondents who indicated that the digital divide impacted online learners at their institutions were also asked about steps their institutions were taking to mitigate its effects. Frequently mentioned strategies included:

- Providing loaner laptops, tablets, and hotspots

- Offering online readiness assessments and orientation modules

- Maintaining on-campus or virtual computer labs

- Pursuing grants to cover technology costs

- Using Universal Design for Learning (UDL) principles

- Supporting digital literacy through workshops and supplemental instruction
- Increasing investments in open education resources (OERs) and low-cost materials

These responses suggest that many institutions are focused on expanding access to essential technologies and supporting digital skill development. Yet some institutions acknowledge that their efforts remain inadequate. As one COLO commented,

This is an area for improvement for us. There is still a disconnect between those offering technical support and the realities of our students' and faculty's access to reliable technical resources and knowledge. There is little movement at this time due to other institutional priorities and a lack of understanding that the digital divide does exist.

When asked about their responsibility in addressing the divide, COLOs expressed mixed views. A plurality (39%) said they felt "somewhat" responsible, while 23% felt "a little," 20% "a great deal," and 13% "not at all" (Figure 24). Several respondents noted that other units, such as IT, student affairs, or financial aid, typically lead efforts. Others emphasized that closing the divide is a shared institutional responsibility.

Figure 24. No Strong Consensus Regarding COLO's Responsibility for Addressing the Digital Divide (Sample = 213)
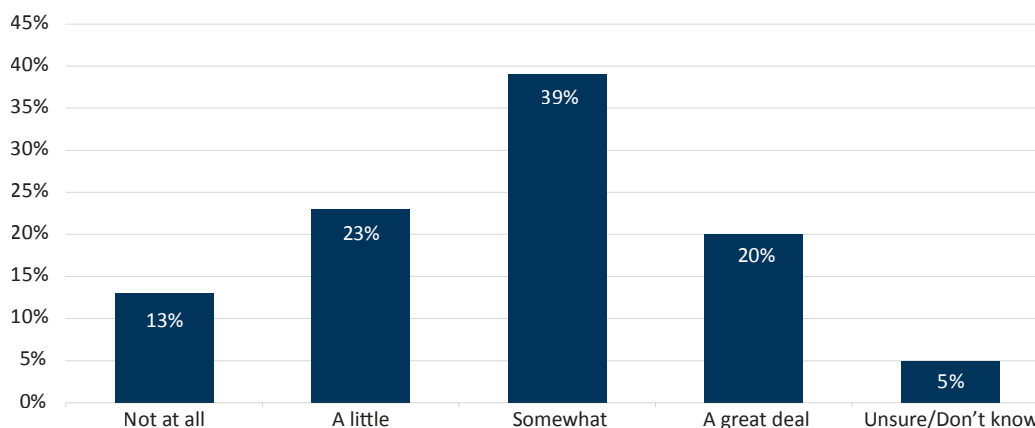
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This broader institutional role is logical, given that the digital divide is not unique to online learning. While access gaps may be more visible in online contexts, online courses can also reduce other barriers by offering flexibility and helping students build digital competencies. However, addressing the digital divide effectively requires acknowledging its relevance across all learning modalities.

As previously mentioned, CHLOE 10 also examined institutional preparedness to address the digital divide in the event of a future emergency shift to remote learning. Only 37% of respondents said their institutions are "fully prepared" with established protocols, while 40% said they are "partially prepared" and "working toward improvement." Readiness levels varied by online enrollment: Institutions with fewer than 1,000 online learners were more likely to be "partially prepared," while nearly half (49%) of COLOs at institutions with more than 7,500 online learners reported being "fully prepared."

Summary: Online Readiness

CHLOE 10 data suggests that while many institutions have built on pandemic-driven online investments, full readiness for high-quality online learning remains uneven. Institutions appear capable of executing short-term pivots to remote instruction. Long-term instructional continuity and quality remain hindered by gaps in faculty preparation, inconsistent student support, and limited planning for

future emergencies. CHLOE 10 findings show modest improvement in online readiness and reveal systemic vulnerabilities. A shift in mindset—from a one-time emergency response to sustained preparedness—is needed.

Robust online learner support is lagging at many institutions. Compared to CHLOE 6, several online student support services show improvement, with accessibility services, advising, and mental health support leading the gains. Yet other areas, such as online student engagement through clubs and organizations, have stagnated or declined despite being previously identified as priority areas. Orientation for online learning—a known predictor of student success—is less prevalent than in previous CHLOE surveys. However, institutions that do offer it are now more likely to make it mandatory. Many COLOs report persistent gaps in coordination, follow-through, and institutional ownership of these critical services.

Faculty preparedness has also plateaued. Most institutions report that faculty are "fully prepared" to use the LMS, but fewer are ready to design or effectively teach online courses. Adjuncts continue to shoulder much of the online teaching load, but COLO comments reveal that training opportunities are often voluntary and unevenly adopted. While some institutions require certification or training for online teaching, others rely on decentralized or ad hoc support, leaving many instructors unprepared for future shifts to remote learning. COLOs voiced concern that institutional memory from the pandemic is fading, and without renewed investment and leadership focus, progress made during COVID-19 may erode.

The digital divide remains widespread, especially at Public 2Y colleges and institutions with large online enrollments. Although many institutions offer loaner equipment, readiness assessments, and digital literacy support, efforts vary significantly, and many are under-resourced. Some COLOs describe a disconnect between institutional support structures and the lived realities of students and faculty navigating access and technology challenges. Moreover, there is no clear consensus on who is responsible for addressing digital access issues, further complicating response efforts.

Online preparedness for tomorrow also means online readiness for today: **The institutions best positioned for the future treat online readiness not as a reactive measure, but as a strategic priority tied to academic continuity, student equity, and institutional growth and resilience.**

DATA STRATEGY AND AI INVESTMENT

Data Strategy and Privacy

A robust data strategy has become a cornerstone of institutional effectiveness in higher education, essential for demonstrating value, supporting student success, and enabling strategic decision-making. For COLOs, effective data use is critical to designing, delivering, and continuously improving online learning programs. A comprehensive institutional data strategy provides a structured framework for collecting, managing, governing, and applying data across departments, helping to ensure that information is accurate, actionable, and secure.

Data privacy plays an equally vital role. It supports responsible data collection, storage, and use; ensures compliance with ethical and legal standards; and helps institutions maintain the trust of students, faculty, and other stakeholders. In digital learning, where sensitive student and instructional data is routinely gathered, strong privacy policies are foundational to building confidence in online environments.

The importance of these priorities is reflected in the 2025 EDUCAUSE Top 10 issues, where the number-one issue is "The Data-Empowered Institution: Using data, analytics, and AI to increase student success, win the enrollment race, increase research funding, and reduce inefficiencies." To understand how these concepts are playing out in online learning, CHLOE 10 explored COLOs' perceptions of data strategy and privacy in terms of institutional emphasis and the effectiveness of existing policies.

Data Analytics and Literacy

Two essential components of a strong institutional data strategy are data analytics and data literacy. In online learning environments, analytics are vital tools for identifying patterns in student behavior, predicting risks, allocating resources strategically, and informing continuous improvement. Data literacy—the ability to interpret and act on data appropriately—is just as critical. Without it, institutions risk misusing or misunderstanding the information needed to guide student success. COLOs play a central role in fostering a culture where data is collected, understood, and used responsibly.

The vast majority of COLOs recognize the strategic importance of analytics:

- Nearly all COLOs (93%) strongly or somewhat agreed that data analytics is a priority for improving online learning (Figure 25).

While CHLOE 10 did not ask respondents to specify how analytics were applied at their institutions, findings from the 2024 EDUCAUSE Analytics Landscape Study provide insight into typical motivators: improving student success and outcomes, increasing retention, and boosting enrollments (Muscanell, 2024).

- COLOs also overwhelmingly agreed (96%) that data analytics is essential for decision-making about online learning.

However, support for data literacy varies by role:

- Nearly all (94%) respondents agreed that data literacy is critical for COLOs.
- Only 87% said the same about faculty and staff working in online learning.

While this gap may reflect a narrow focus on centralized data strategy, broader data literacy adoption among faculty, staff, and program leads can enable more consistent, course-level decision-making and improve outcomes across the institution.

Figure 25. COLOs View Data Analytics as Critical, but Governance Gaps Remain (Sample = 225–226)

Statement	Strongly Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
I consider data analytics a strategic priority for improving online learning.	63%	30%	4%	2%		1%
I consider data analytics to be necessary for decision-making about online learning.	66%	30%	2%		1%	1%
Data literacy is critical for my work as COLO.	62%	32%	4%	1%		1%
Data literacy is critical for faculty and staff who work in online learning.	39%	48%	9%	2%		1%
Data related to online learning is well-defined and understood.	12%	28%	21%	32%	6%	1%
Overall, effective data governance policies are in place to guide data collection, storage, and use.	17%	35%	20%	19%	6%	3%

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Note: Rows/columns may not add up to 100% due to rounding.

Data Governance

While COLOs broadly support the importance of data analytics, their assessments of the current state of online learning data and governance are far more mixed:

- Just 40% of respondents somewhat or strongly agreed that online learning data at their institutions is well-defined and widely understood.
- Nearly as many (38%) somewhat or strongly disagreed, and 21% were neutral.

These responses suggest a lack of consensus around what constitutes "online learning data" and how it should be interpreted. This may hinder its effective use for decision-making and improvement.

Similarly, institutions appear divided on the strength of their data governance frameworks:

- About half (52%) of COLOs somewhat or strongly agreed that effective policies were in place to guide the collection, storage, and use of online learning data.
- However, 25% disagreed and 20% were neutral, indicating potential uncertainty or inconsistency in institutional policy, oversight, or communication.

These findings suggest an opportunity for institutions to establish or reinforce governance practices that ensure transparency, accuracy, and accountability in online learning data management.

Data Privacy

Most COLOs view data privacy as critical to online learning strategy and infrastructure:

- A large majority of COLOs agreed (56% strongly, 29% somewhat) that data privacy is a strategic priority for improving online learning programs.
- Most respondents agreed (65% strongly, 24% somewhat) that data privacy is actively evaluated while procuring online learning tools, underscoring its importance in vendor selection and platform adoption (Figure 26).

A majority also had confidence in institutional collaboration and sufficiency of institutional polices:

- 57% of COLOs strongly agreed they could effectively partner with their institutions' data privacy professionals to support online learning.
- 53% strongly agreed that their institutions' data privacy policies adequately protect online learners and their data.

Sector differences emerged as well:

- COLOs at public institutions expressed higher confidence (86% two-year and 85% four-year "strongly" or "somewhat agree") in their institutions' policies compared to COLOs at Private 4Y institutions (73%).

These results suggest that while data privacy is broadly prioritized, perceptions of policy adequacy are somewhat sector-dependent.

**Figure 26. Strong Agreement That Data Privacy Is Critical to Online Learning
Program Strategy and Procurement (Sample = 224–225)**
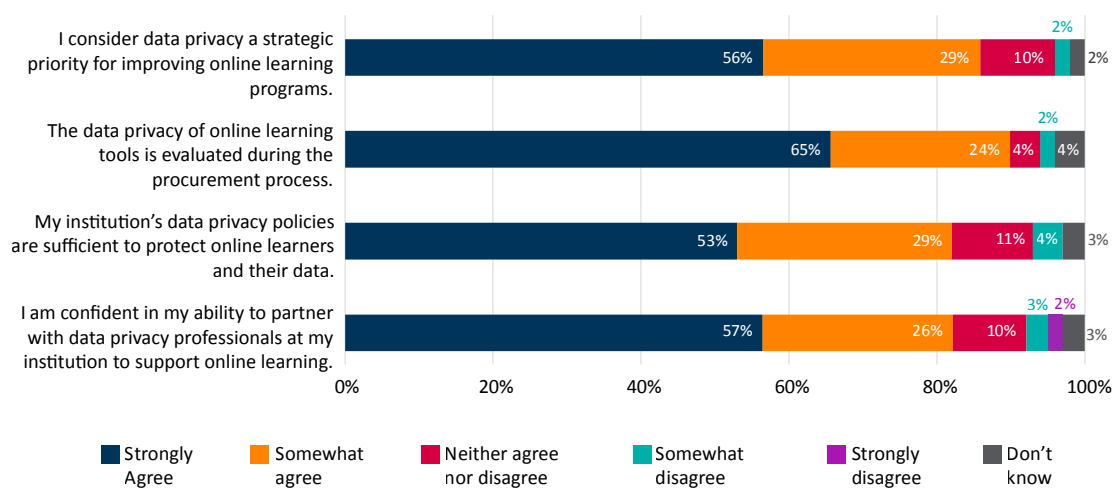
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Note: Rows/columns may not add up to 100% due to rounding.

AI Access, Strategy, and Investment

Despite broad agreement that the digital divide affects online learners, COLOs expressed greater uncertainty around AI access.

When asked to what extent differences in AI tool access impact online learners:

- 57% said at least some online learners were impacted (33% said some, 19% said many, 5% said all).
- 19% said there were no differences in student access to AI tools; 23% said they were unsure.

These perceptions varied by sector:

- 25% of COLOs at Private 4Y institutions reported no differences in access, compared to 14% of COLOs at Public 2Y institutions and 18% at Public 4Y institutions.
- Conversely, 25% of COLOs at Public 2Y and 22% at Public 4Y institutions said that AI access differences affected many students, compared to only 9% at private institutions.

These disparities suggest that public sector institutions may face more acute challenges in ensuring equitable access to AI tools for online learners—perhaps because of larger scale or more limited student and institutional resources

Most COLOs report a fragmented AI strategy (Figure 27):

- A majority (66%) indicated that AI planning occurs at the unit level, with individual departments or offices developing localized strategies.
- Only 23% reported having an institution-wide approach.
- 9% of respondents said their institutions had no AI-related strategy.

This fragmentation mirrors findings from the 2025 EDUCAUSE AI Landscape Study, which identified a lack of coordinated, enterprise-wide AI strategies across higher education. As institutional use of AI accelerates, a more cohesive and integrated approach will be necessary to align efforts, reduce redundancy, and ensure responsible adoption.

**Figure 27. The Majority of COLOs Indicate That AI Strategy Is Developing in
Some Areas, but No Institution-Wide AI Strategy Exists (Sample = 226)**

We have an institution-wide approach to AI-related strategy.	Yes 23%
Some areas of the institution are working on AI-related strategies, but there is no institution-wide approach.	Somewhat 66%
No: We do not have an AI-related strategy.	No 9%
Unsure/Don't know	Unsure 1%

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COLOs were also asked to what extent investing in AI technologies and supports (e.g., AI-powered tools, tools with AI-powered features, AI-related professional development, AI-related technical support) were currently important for online learning programs (Figure 28).

Currently:

- 56% of respondents rated AI technologies and supports as "somewhat" important to online programs.
- 22% said they were "very" important; 15% said "extremely" important.
- Only 6% of COLOs felt AI technologies and supports were "not at all" important for online programs.

A follow-up question asked them to rate the importance of AI technologies to online programs *in the next two years*; responses showed a projected uptick:

- 33% of COLOs expect these technologies will be "extremely" important, 39% said they'll be "very" important, and 23% believe they'll be "somewhat" important.
- Just 1% of COLOs believe that AI technologies and supports will be unimportant for online programs in two years.

This trend suggests growing urgency and awareness around AI's role in shaping the future of online learning. While many institutions have tools with embedded AI features, the rise of "bring-your-own-AI" (BYOAI) practices underscores the need for (but may also limit the reach of) institutional guidance, training, and oversight.

**Figure 28. AI-Powered Technologies and Supports Will Be Increasingly
Important for Online Learning Programs in the Next Two Years
(Sample = 205)**
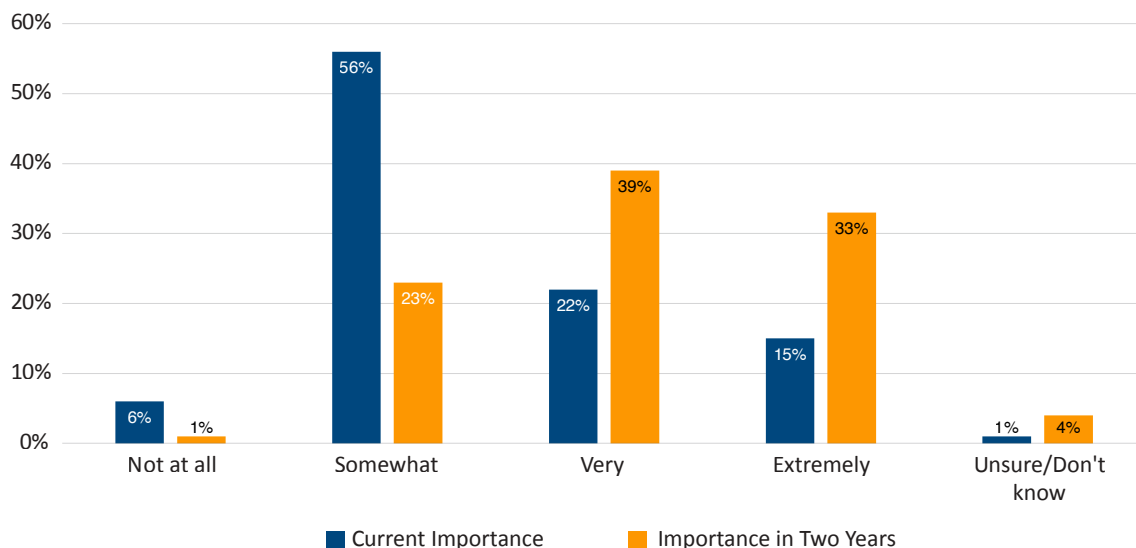
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When asked to identify (from a list) their three primary goals of AI investments, COLOs overwhelmingly identified student-focused goals (Figure 29):

- Preparing students for the workforce was identified as a primary goal by 77% of COLOs.
- Improving student learning was named by 67% of COLOs.
- 59% of COLOs identified exploring new instructional methods as a priority.

These responses reflect a growing alignment between institutional priorities and labor market demands, as employers increasingly value AI literacy. Faculty support was also identified as a significant goal by 24% of respondents, and the top four goals were consistent across sectors. Just 1% of COLOs reported that their institutions were not investing in AI.

**Figure 29. Goals for AI Technology Investments Emphasize Improved Student
Outcomes (Sample = 205)**

Prepare Students for the Future Workforce	Improve Student Learning	Explore New Methods of Teaching and Learning	Facilitate Faculty Support	Attract Students to Degree-Granting Programs
77%	67%	59%	24%	14%
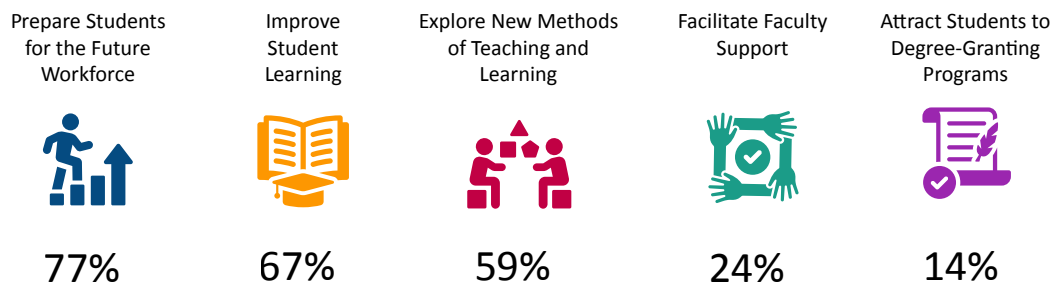
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Lastly, COLOs were asked about how AI tools and capabilities are being used at their institutions. Responses showed that the highest adoption rates are in areas focused on enhancing both efficiency and instructional quality. The most frequently cited use cases were "workload efficiency" (49%) and "course preparation" (46%) (Figure 30). This trend is encouraging, especially in light of ongoing concerns about excessive workloads in higher education.

Notably, 37% reported using AI for "accessibility," indicating that some institutions are exploring AI's potential to support inclusive learning design. However, few institutions use AI for "cybersecurity" (8%) or "data privacy" (7%), signaling possible gaps in AI application or awareness.

**Figure 30. Institutional Functions for AI Tools or Capabilities Focus on
Enhancing Instructional Support and Efficiencies (Sample = 203)**
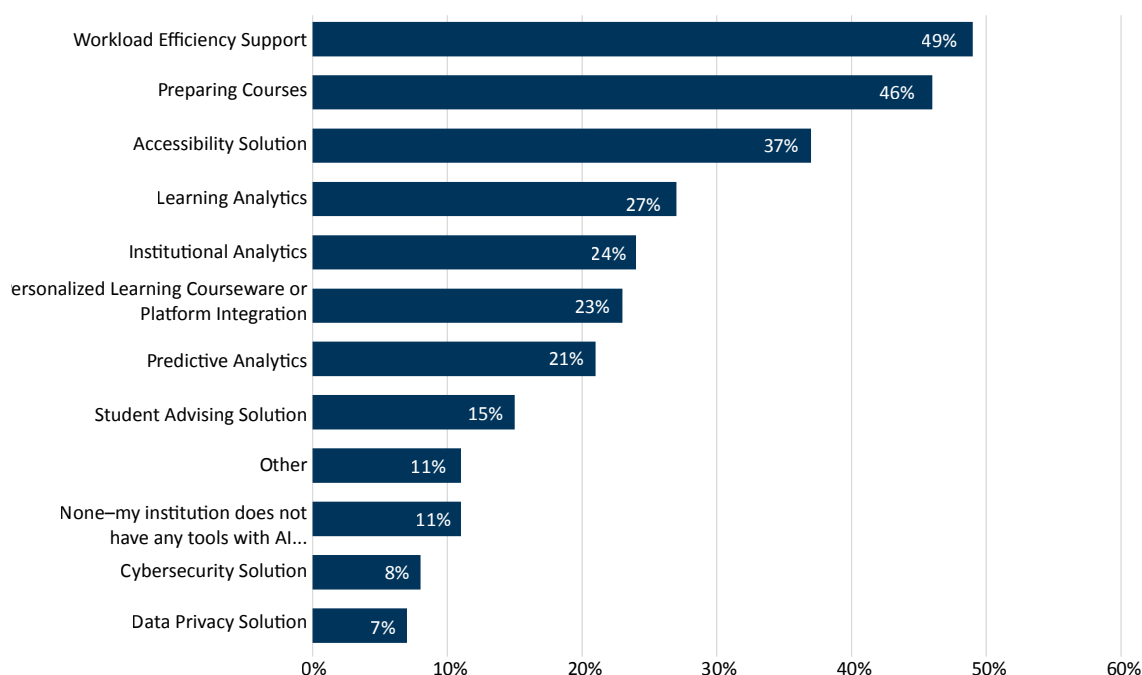
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Summary: Data Strategy and AI Investment

CHLOE 10 findings affirm that data strategy, privacy, and AI are rapidly becoming core components of high-functioning online learning ecosystems. COLOs view data analytics as essential to improving online learning and guiding institutional decision-making. Yet gaps remain in data governance and shared understanding: While nearly all respondents agree that data literacy is critical for COLOs, somewhat fewer emphasize its importance for faculty and staff. A lack of consensus on data definitions and inconsistent governance structures hinders institutions from fully leveraging analytics to support student success.

Most COLOs report that data privacy is a strategic priority and a key consideration in procurement decisions. Confidence in campus-wide data privacy policies is generally strong, though perceptions of adequacy vary by sector. These findings suggest that while privacy awareness is high, policy maturity and implementation may differ across institutional types.

Artificial intelligence is a rising priority. While only a minority of institutions have fully developed, institution-wide AI strategies, the majority report localized efforts underway. COLOs expect AI-powered tools, support services, and professional development to become significantly more critical in the next

two years. Their top AI investment goals focus squarely on student success: preparing students for the workforce, enhancing learning, and enabling innovative teaching approaches. Yet AI access remains uneven. Public sector institutions, particularly two-year colleges, report greater concern over disparities in student access to AI tools, raising new equity considerations amid rising AI adoption.

Data strategy, privacy, governance, and AI are fundamental foundations for online learning. Institutions that can connect these pieces into a coherent digital learning infrastructure will be better positioned to respond to changing technologies, support student outcomes, and lead the future of online education.

THE CHLOE 10 SAMPLE

The CHLOE 10 Report is based on an online survey of chief online learning officers (COLOs) at U.S. colleges and universities, conducted in January and February 2025. Survey invitations were sent to approximately 4,250 institutions, targeting COLOs or their closest equivalents across public, private, and for-profit two- and four-year institutions. This outreach drew from past CHLOE participants, existing contacts, and purchased lists of relevant titles.

The term "chief online learning officer" (COLO) reflects the growing prevalence of formal leadership roles in online learning, although specific titles and responsibilities vary widely across institutions. The CHLOE 10 Survey yielded 257 responses, including usable partials, for a response rate of 6%, lower than CHLOE 9's 324 responses. Importantly, analysis confirmed that partial respondents shared a similar institutional profile with complete respondents, enhancing the reliability and scale of the sample. The CHLOE 10 Survey was conducted during a time of increased volatility in higher education, following the start of the second Trump administration.

Sample sizes for individual survey items vary (generally in the low to mid 200s), yielding a margin of error of approximately ±6% at a 95% confidence level, which is slightly higher than in previous CHLOE surveys.

The CHLOE 10 sample closely mirrors earlier CHLOE samples and the overall landscape of U.S. higher education institutions, especially when compared by institutional sector and enrollment patterns. As shown in Table 8, the sample slightly overrepresents Private 4Y institutions and underrepresents for-profits, but remains broadly reflective of the national picture, especially regarding public institution representation and online enrollment levels.

Table 8: The CHLOE 10 Sample vs. U.S. Higher Education (Fall 2023)

Sector	Public 2Y	Public 4Y	Private 4Y	For-Profit
Institutions	21%	19%	37%	19%
Total Enrollment*	24%	48%	21%	5%
Online Enrollment**	25%	49%	18%	8%
Fully Online Enrollment*	27%	36%	23%	13%
CHLOE 10 Sample	24%	46%	29%	1%

Sector	Public 2Y	Public 4Y	Private 4Y	For-Profit
DIFFERENCE between CHLOE 10 Sample and Online Enrollment	-1 percentage point	-3 percentage points	+11 percentage points	-7 percentage points

N.B. Row totals exclude the small number of degree-granting institutions outside these sectors. *Undergraduate and graduate students combined. **Fully online students and those taking one or two online courses as part of an otherwise campus-based experience—undergraduate and graduate combined.
Source: IPEDS.

For comparison, CHLOE 4 (2019) included 27% Public 2Y, 36% Public 4Y, 34% Private 4Y, and 2.2% for-profit institutions. CHLOE 10 offers stronger Public 4Y representation but diminished participation from for-profit and Private 4Y institutions.

The CHLOE survey continues to offer a reasonable representation of U.S. higher education (apart from for-profits) as a whole and online higher education in particular.

Table 9 shows that CHLOE 10 captures a broad range of institutional types and sizes, from small online operations to large-scale programs. While point-in-time fall enrollment shows 22% of respondents in the high-OE category (7,500+ students), the 12-month unduplicated headcount reveals a more online-centric profile, with 39% categorized as high-OE and 49% as mid-OE (1,000–7,500 students).

These differences highlight the value of multiple enrollment metrics in understanding institutional scale. The larger online enrollments observed across 12-month reporting suggest a continued post-pandemic shift toward more sustained and expansive online activity in higher education.

Table 9. The CHLOE 10 Sample by Online Student Headcount (Fall 2023 vs. 12-Month 2023–24)

CHLOE 10 Sample	High >7,500	Mid-Sized 1,000-7,500	Low <1,000
CHLOE 10 Schools by Number of Fully and Partially Online Students (Fall 2023)	57	121	79
% of CHLOE 10 Sample	22%	47%	31%
CHLOE 10 Schools by Number of Fully and Partially Online Students (12-Month 2023/24)	101	126	30
% of CHLOE 10 Sample	39%	49%	12%

The "low" category includes a few schools reporting zero online enrollment. Source: IPEDS.

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CHLOE SPOTLIGHT: A PROFILE OF CHIEF ONLINE LEARNING OFFICERS

By Eric E. Fredericksen, Ed.D.

Prior CHLOE reports have emphasized that online learning in U.S. higher education has achieved mainstream status, so there is great value in examining the individuals who guide online programs and initiatives. CHLOE has long wanted to explore more about COLOs, but we have been inhibited by the need to limit CHLOE surveys to a manageable length. Therefore, we decided to conduct a special study of COLOs during the late summer of 2024. UPCEA, the organization that produces the UPCEA COLO competencies, was a partner in this study. The survey instrument, with 25 multiple-choice questions (that utilized a Likert-type scale) and six open-ended questions, was shared with the same audience as every other CHLOE study and yielded more than 500 responses.

A research paper on chief online learning officers (COLO Profiles & Competencies 2024) is scheduled for publication in the September 1, 2025, issue of the Online Learning Journal (OLJ). Due to the relevance of its findings and reader interest, the research highlights and key findings are included in this CHLOE 10 Report.

The study builds on national studies of online learning leadership from 2017 and 2018. It considers institutional data for context, gathers information about the leaders' positions and professional experiences, and seeks the COLOs' perspectives on the importance of the UPCEA COLO competencies at their institutions and their self-assessments of those skills and aptitudes.

Institutional Context

The first survey question was related to the COLOs' responsibilities for academic offerings at their institutions. Most responses indicated that the COLOs' responsibilities included both web-based learning activities and resources integrated into the institution's face-to-face courses and fully and hybrid online courses and programs (Figure 31).

Figure 31. COLO Scope of Responsibilities

Category	Percentage
Fully online courses and programs	90%
Hybrid/blended online courses and programs	81%
Web-based learning activities and resources integrated into face-face courses	55%
Other	9%
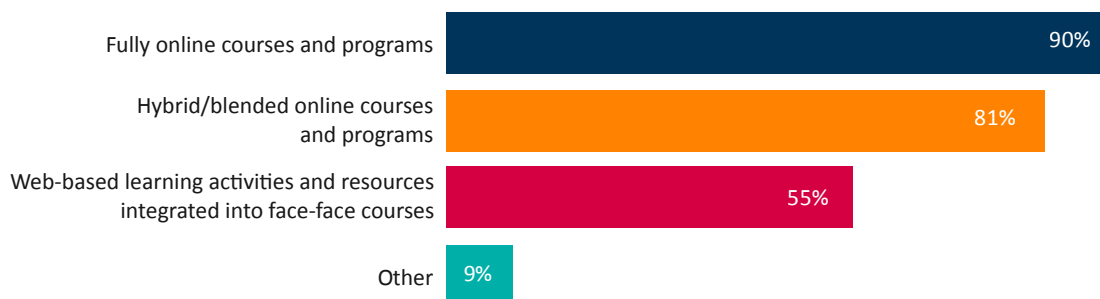
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Complementing the scope, we were interested in the reporting relationship for online learning leaders. More than two-thirds of the respondents reported to the institution's "Provost/Chief Academic Officer (CAO)" or "Other Senior Academic Leader." Consistent with prior studies, it should be noted that only 2% of the leaders reported to the Chief Information Officer (CIO). This validates the view that online learning is not an IT function, even if it relies on a robust IT platform (Figure 32).

Figure 32. COLO Reporting Relationship

Category	Percentage
Provost/CAO	41%
Other Sr Academic Leader	27%
Dean	9%
VP/SVP outside of Academic Affairs	7%
Other	7%
President	6%
CIO	2%
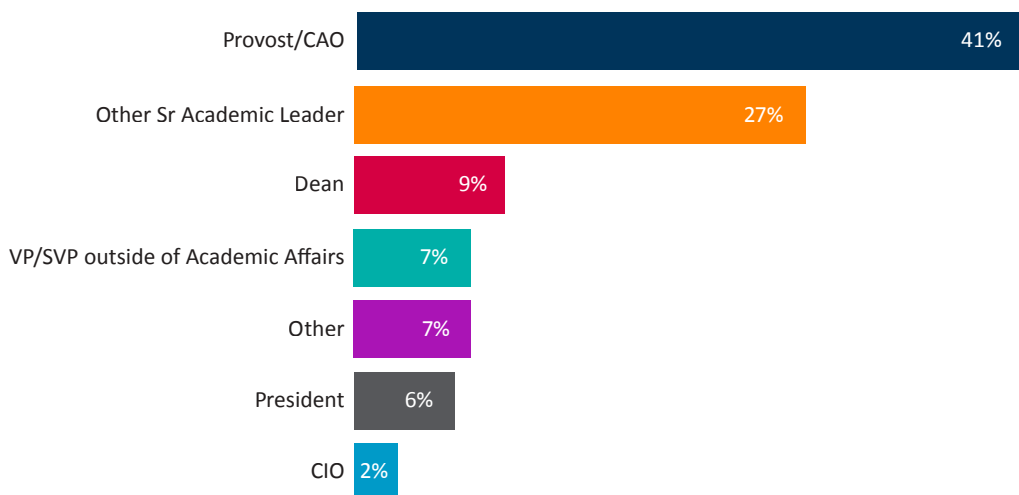
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A common approach to the operations and governance of higher education institutions is to use committees. We inquired about COLO membership as evidence of the influence of the position at the institution. The results highlight this, with over three-fourths of COLOs serving on their Online Learning Committees, about half serving in the Provost's Cabinet, and one out of five in the President's Cabinet. We also asked COLOs if the institution used their online learning efforts to catalyze organizational changes. Over 60% of COLOs reported they did, a slightly lower percentage than in previous studies. Analyzing this item by institutional sector did not suggest statistically significant differences.

Following those two items, we asked which units and functions were unified with the COLO. We provided a list of 14 options, and the figure below reflects the operating units selected by most COLOs. These units are consistent with prior studies, although "course design and multimedia" fell under the 50% threshold

this past year. The results were consistent across sectors. The other units under 50% included the "center for teaching & learning," "faculty IT support," "library support for faculty," "marketing," "student services," "advising," and "educational research" (Figure 33).

Figure 33. Organization Units Unified with the COLO

Organization Unit	Percentage
Instructional Design	74%
Learning Management Systems	68%
Online Learning Policy Development	60%
Academic / Educational Technology	56%
Faculty Development and Training	52%
Course Design and Multimedia	43%

Consistent across sectors
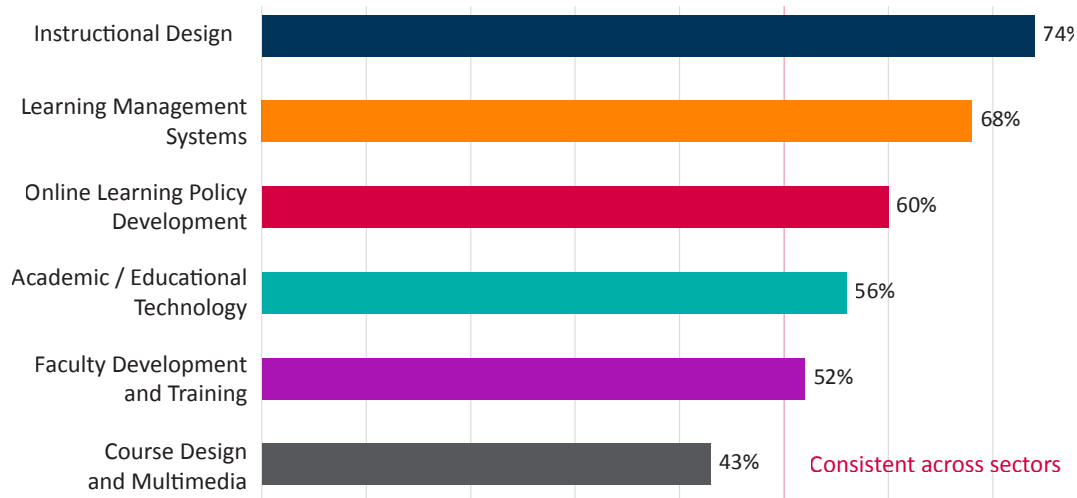
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The Position and Titles of COLOs

We then turned to the positions and titles of the individual COLOs. We started by determining whether they were promoted from within the institution or externally recruited. Almost 60% of COLOs indicated that they were promoted from within their institutions, a result that was consistent across institutional sectors.

The next area of inquiry related to COLO titles was solicited as open-ended questions coded into several title categories. The first question asked the COLOs about their current titles, and the top response was "Director," and the second was "Associate/Assistant Vice President/Provost." Breaking this down by the institutional sector revealed some modest differences. Public and private four-year institutions cited "Associate/Assistant Vice President/Provost" as the number two response, more than their Public 2Y counterparts who noted "Dean" as their second choice (Figure 34).

Figure 34. Current COLO Title

Title	Percentage
Director	30%
Assoc/Asst VP/Provost	16%
Dean	12%
Vice President/Provost	11%
Sr/Exec Director	10%
Coordinator	5%
Other	5%
Assoc/Asst Dean	4%
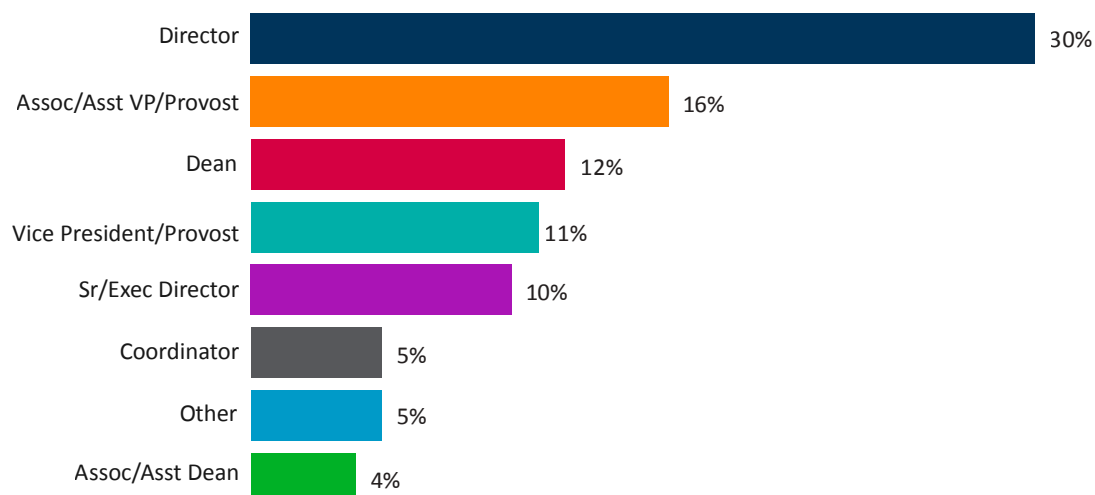
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COLOs were then asked about their previous roles. "Director" was the title most COLOs referenced for their positions before their current roles, and "faculty title" was the second most-cited response.

The response to the question about each COLO's next position was intriguing. The number one answer was "Vice President/Provost," but the number two was "retirement" (followed by "dean" and "Associate/ Assistant VP/Provost"). We identified "happy" as a response, and this is our coding for all the comments from COLOs who expressed their satisfaction and gratitude for what they were currently doing and were "happy" to continue. We also want to note the response "new institution." This response represents COLOs who hope to leave their colleges or universities to go to another. When you consider adding that to the number two answer of "retirement," you have almost one in five COLOs who might not be in that role in the near future. This suggests that institutions would do well to consider retention, development, and succession strategies.

This level of turnover compares favorably to other leadership roles. In 2024, our colleagues at EDUCAUSE captured turnover rates in three leadership roles—president, provost, and CFO—and found personnel transitions between 33 and 39%. Another study by Higher Education Publications, Inc. reported lower turnover rates for a broader set of leadership positions, in the range of 18-20% over the past 10 years (Figure 35).

Figure 35. The Next Position for the COLO

Position	Percentage
Vice President/Provost	17%
Retirement	14%
Dean	14%
Assoc/Asst VP/Provost	11%
Happy	10%
President/Provost	9%
COLO	8%
Director	6%
Other	5%
New Institution	4%
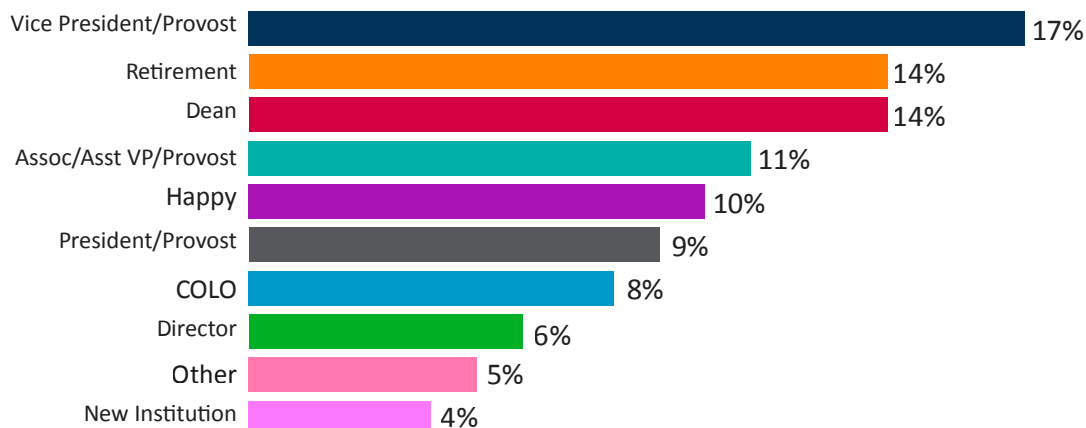
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Reviewing COLO Titles in Historical CHLOE Data

We have collected COLO titles with every CHLOE survey (more than 3,200 individual COLO responses over a decade). The titles submitted to CHLOE surveys are open-ended responses, and we coded them into the same 16 categories as this COLO Profile study. While this granular allocation captures a variety of position levels, it should be noted that just seven of these categories represent roughly 85-90% of the COLO positions. As shown in the figure below, there is a fair amount of consistency between the COLO Profile data and the historical title data from the ten CHLOE studies. A "director" title is the most common response, followed by "Associate/Assistant VP," "Dean," and "VP" (Figure 36).

Figure 36. COLO Titles—2024 and Historical Data from CHLOE 1–10

	Director	Assoc/Asst VP	Dean	VP	Assoc/Asst Dean	Sr/Exec Director	President/Provost
CHLOE 1-10 Public 2yr	34%	7%	20%	9%	6%	3%	7%
CHLOE 1-10 Public 4yr	29%	16%	7%	13%	3%	11%	8%
CHLOE 1-10 Private 4yr	28%	14%	14%	13%	7%	5%	7%
CHLOE 1-10 All sectors	29%	13%	13%	12%	5%	7%	8%
SAMPLE 2024	30%	16%	12%	11%	4%	10%	1%
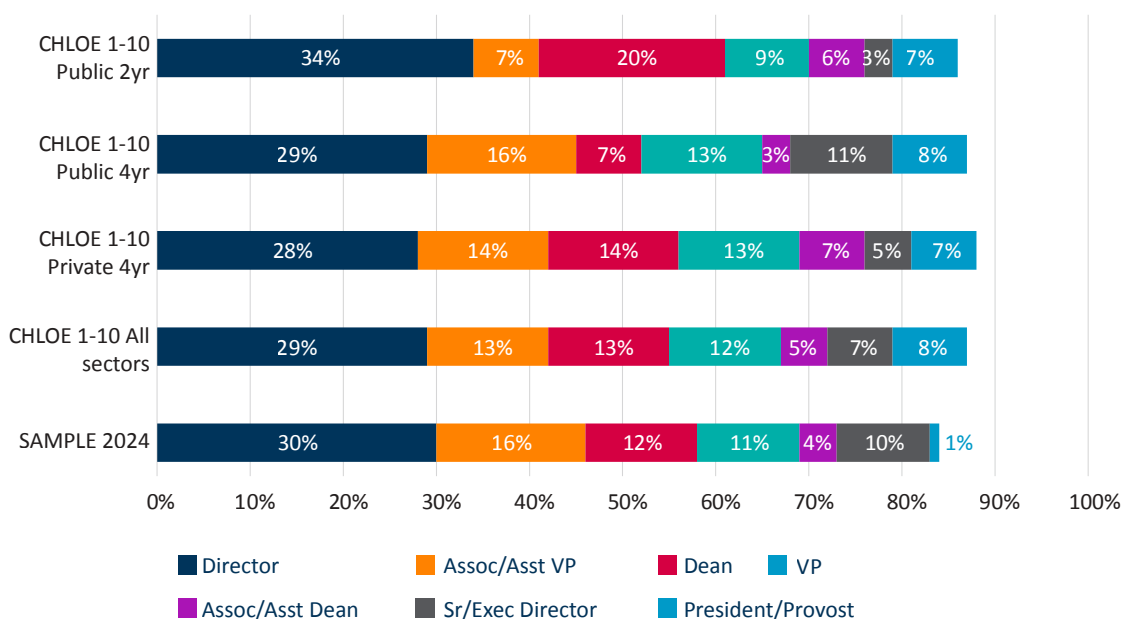
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The "director" title remains the most cited response when breaking this data down by the institutional sector. However, there are differences for the titles in second, third, and fourth place. Private and public four-year institutions (14% and 16%) have "Associate/Assistant Vice President" as their second most cited title, while only 7% of Public 2Y institutions use this title for their COLOs. In contrast, 20% of Public 2Y institutions' COLOs have a dean's title, 14% of COLOs from Private 4Y institutions are deans, and only 7% of COLOs from Public 4Y institutions are deans. We can also see that 13% of COLOs from private and public four-year schools have a "VP" title, but only 9% of COLOs from Public 2Y institutions are Vice Presidents/ Provosts. These findings reflect differences in organizational size and complexity.

We wondered if there have been any changes or trends relative to titles over the past decade. We split the surveys in half and broke down our analysis by CHLOE 1-5 compared to CHLOE 6-10. Although CHLOE 5 was a specially-timed issuance of the report to address the pandemic and remote learning that began in 2020, splitting the reports allows a fairly good comparison of a pre- and post-pandemic landscape.

For all sectors combined, we saw a reduction in the percentage of COLOs with a "director" title from 34% pre-pandemic to 25% post-pandemic. There was also a decline in the COLOs with a "Dean" title from 16% to 10%. There was a significant increase in the COLOs with a Vice President/Provost title from 8% to 15%.

The differences seem more pronounced when we examine changes by institutional sector. At Private 4Y institutions, the "director" title was reduced from 31% to 25%, and the "dean" title went from 18% to 11%, but the vice president/provost role almost doubled from 9% to 17%. The shift in Public 4Y institutions was even more dramatic. Those schools had a decrease in "director" titles from 38% to 22% and "dean" titles from 9% to 6%, but almost doubled the COLOs with a Vice President/Provost title from 8% to 15%. Public 2Y colleges had a similar experience, with a decrease in "director" titles from 37% to 31% and "dean" titles from 25% to 17%. At the same time, the number of Associate/Assistant Vice President/Provost titles doubled from 4% to 8%, and the Vice President/Provost titles almost doubled from 6% to 11%.

With the emergency pivot to remote learning, and subsequent increased demand for online options, it likely became evident to campus executives that online learning had become more mainstream. As a result, it required greater leadership and institutions promoted their COLOs, gaining higher visibility and authority for those efforts. We believe that the performance and effectiveness of the COLOs during this time would also contribute to this phenomenon (Figure 37).

Figure 37. COLO Titles—Comparing CHLOE 1–5 Data (Pre-Pandemic to Spring 2020) with CHLOE 6–10 Data

Category	Director	Assoc/Asst VP	Dean	VP	Assoc/Asst Dean	Sr/Exec Director	President/Provost
CHLOE 6-10 Public 2Y	31%	8%	17%	11%	4%	3%	10%
CHLOE 1-5 Public 2Y	37%	4%	25%	6%	7%	3%	2%
CHLOE 6-10 Public 4Y	22%	16%	6%	15%	3%	10%	10%
CHLOE 1-5 Public 4Y	38%	16%	9%	8%	2%	13%	4%
CHLOE 6-10 Private 4Y	25%	14%	11%	17%	7%	5%	9%
CHLOE 1-5 Private 4Y	31%	15%	18%	9%	8%	6%	4%
CHLOE 6-10 All sectors	25%	13%	10%	15%	5%	7%	10%
CHLOE 1-5 All sectors	34%	13%	16%	8%	5%	8%	4%
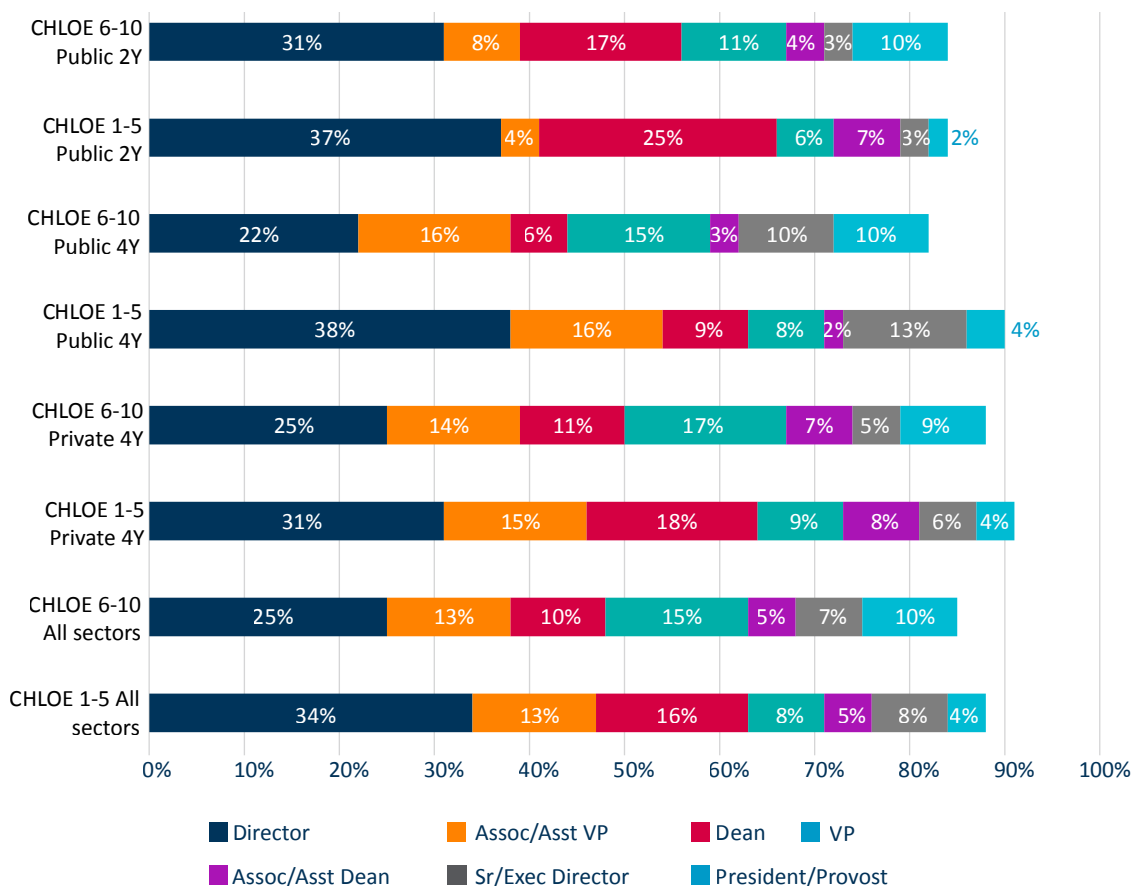
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Additional Background and Experience of COLOs

The study captured length of service in higher education. Over half of COLOs have worked in higher education for at least 16 years, and 40% have worked in the sector for over 20 years (Figure 38).

Figure 38. Years of Experience in Higher Education

Years	Percent
Less than 1	13%
1-5	11%
6-10	9%
11-15	11%
16-20	15%
More than 20	40%
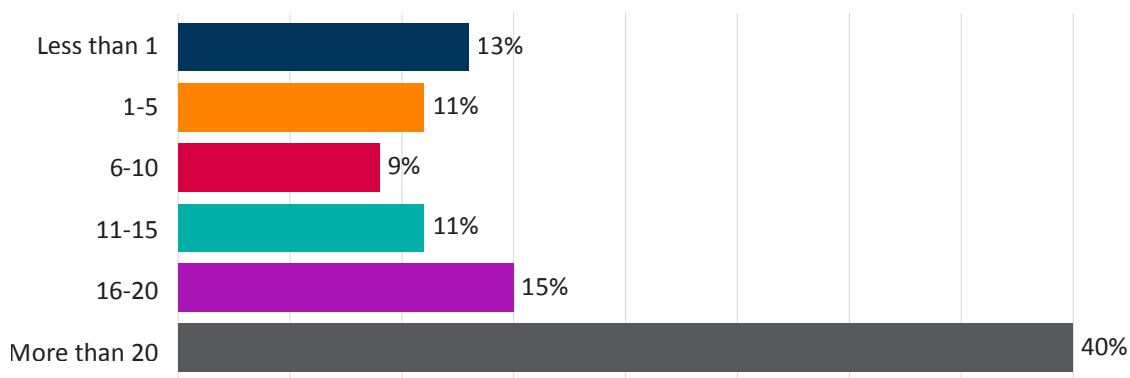
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Given the importance of relatable experience and the value of peer relationships, the study asked whether the COLO also held a faculty appointment. Over 40% of COLOs said yes (16% "tenure or tenure track" and 25% "non-tenure track"), and 59% said "no." We investigated this item by institutional sector, and some differences were statistically significant. COLOs at Private 4Y institutions were much more likely (51%) to hold a faculty appointment than their Public 4Y (42%) and Public 2Y (19%) peers (Figure 39).

Figure 39. COLOs with Faculty Appointments
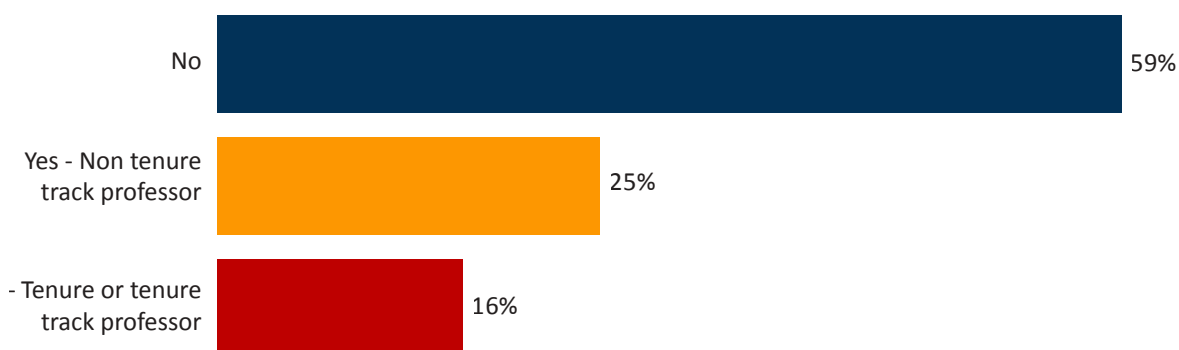
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We also asked about the COLOs' academic credentials. Most (56%) COLOs have earned a doctoral degree, with 35% having a Ph.D. and 21% an Ed.D. This result was consistent with prior studies. It is worth noting that virtually all COLOs have some type of graduate degree (Figure 40).

Figure 40. Academic Credentials of the COLO
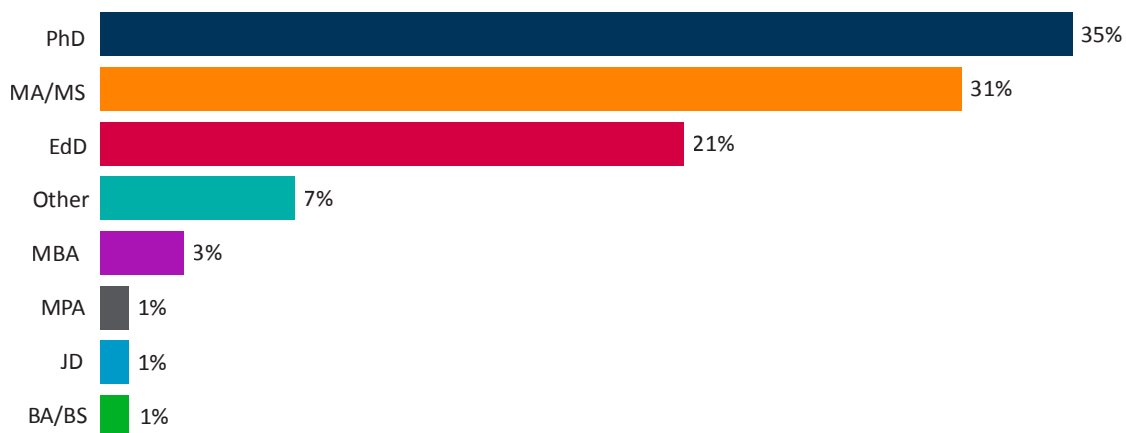
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The question about academic credentials was paired with a query about the fields of those degrees. While this was a "check-all-that-apply" question, the most cited discipline was "education" (60%). This result was consistent with prior studies (Figure 41).

Figure 41. Academic Disciplines of the COLO Credentials

Discipline	Percentage
Education	60%
Social Sciences	23%
Humanities	22%
Business	19%
Other	17%
Computer Science / IT	12%
Natural Science	5%
Healthcare	4%
Engineering	3%
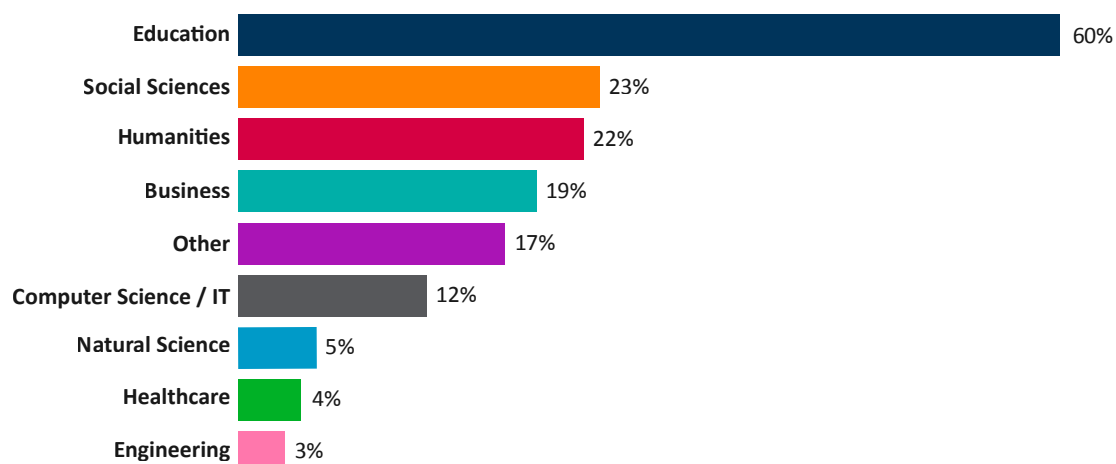
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Most (79%) of COLOs have been online students, with one out of three earning a complete online degree. When analyzed by institutional sector, COLOs at Public 2Y institutions were slightly more likely (85%) to have experience as an online student than their four-year counterparts (76%) (Figure 42).

Figure 42. COLOs with Online Student Experience

Response	Percentage
Yes - I have taken multiple online courses as a student	34%
Yes - I have earned a completely online degree	32%
No	21%
Yes - I have taken one online course as a student	14%
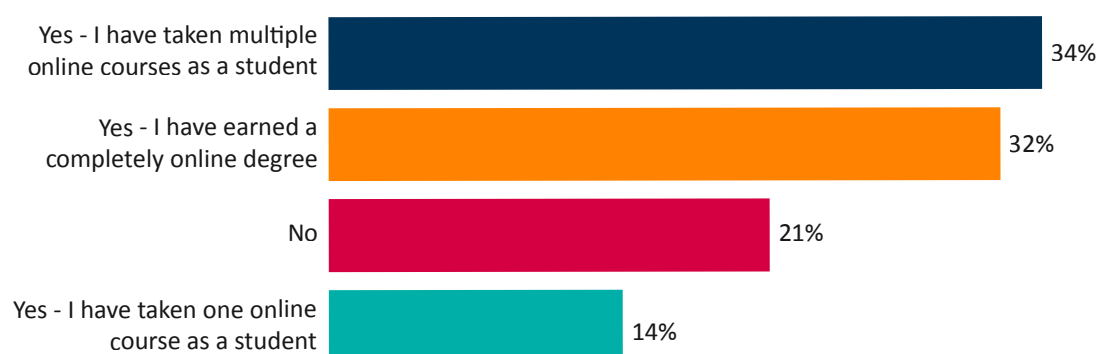
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Prior studies found that COLOs often have a rich blend of professional experiences, which helps them collaborate with various constituent groups across their campuses. We investigated these areas again.

The figure below summarizes professional experiences and consolidates our captured responses to reflect "more than 10 years of experience" or "more than five years of experience." These results are consistent with prior studies. Of note is the last area, IT, which shows that a minority of COLOs have IT experience; 35% of COLOs told us they had no IT experience. Of course, IT is essential to online learning, but this finding underscores our assertion that online learning is an academic endeavor, not a "tech" activity (Figure 43).

Figure 43. COLO Years of Experience in Important Domains
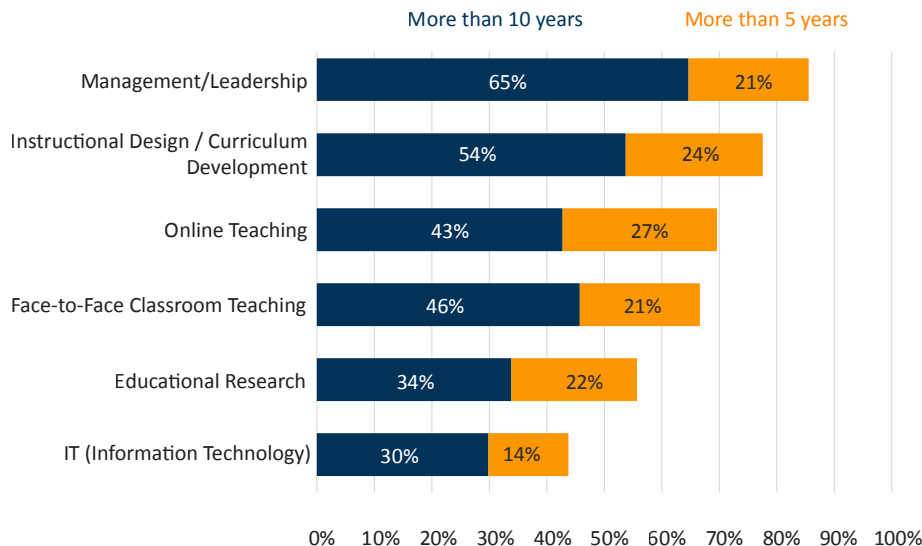
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UPCEA COLO Competencies

UPCEA, the professional association for leaders and staff in professional, continuing, and online postsecondary education, developed a competency set for online leaders at two- and four-year institutions in the United States. We were interested in COLO feedback on this work. We sought to establish the importance of specific competencies and attributes of the chief online learning officer role. Additionally, we wanted to determine the degree to which COLOs believed they possessed these competencies and characteristics.

Given the space available in this report and the extensive review of results in the research journal article, we encourage readers interested in the importance of these competencies and the self-assessment by COLOs to review our article in the OLJ (Fredericksen et al., in press).

COLOs Staying Informed

The last section of the study examined ways that COLOs stay up-to-date with online learning practices and policies, from engaging in professional development to staying connected to organizations and resources.

We started with an open-ended question about sources used by COLOs to stay current. The coding of those responses yielded two areas cited by the majority: "publications" (69%) and "conferences and events" (50%). Other notable resources included "organizations" (46%) and "peers" (41%). We did see differences by sector, with four-year institutions more likely (73%) to highlight publications than their two-year counterparts (57%) (Figure 44).

Figure 44. COLO Sources of Staying Informed

Source	Percentage
Publications	69%
Conference & Events	50%
Organizations	46%
Peers	41%
Research	32%
Webinars & Podcasts	19%
Vendors	19%
Email Lists	13%
Social Media	8%
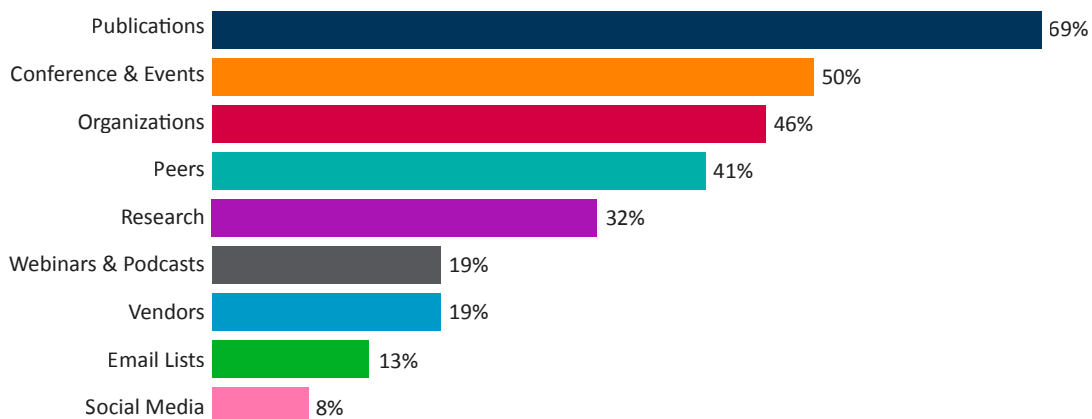
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Regarding community organizations, we asked COLOs which groups they belonged to, which they did not, which they might join, and which they might drop. The top five organizations that COLOs or their institutions belonged to were Quality Matters (QM) (67%), EDUCAUSE (64%), the Online Learning Consortium (OLC) (58%), UPCEA (44%), and WCET (41%) (Figure 45).

Figure 45. Community Organization Memberships for COLOs

Organization	Yes	Yes but might drop	No but might join	No
QM	67%	3%	8%	21%
EDUCAUSE	64%	4%	8%	24%
OLC	58%	5%	12%	25%
UPCEA	44%	1%	9%	47%
WCET	41%	2%	18%	39%
USDLA	15%	3%	16%	66%
ISTE	10%	1%	11%	77%
AECT	9%	2%	12%	76%
League Innov.	9%	1%	7%	83%
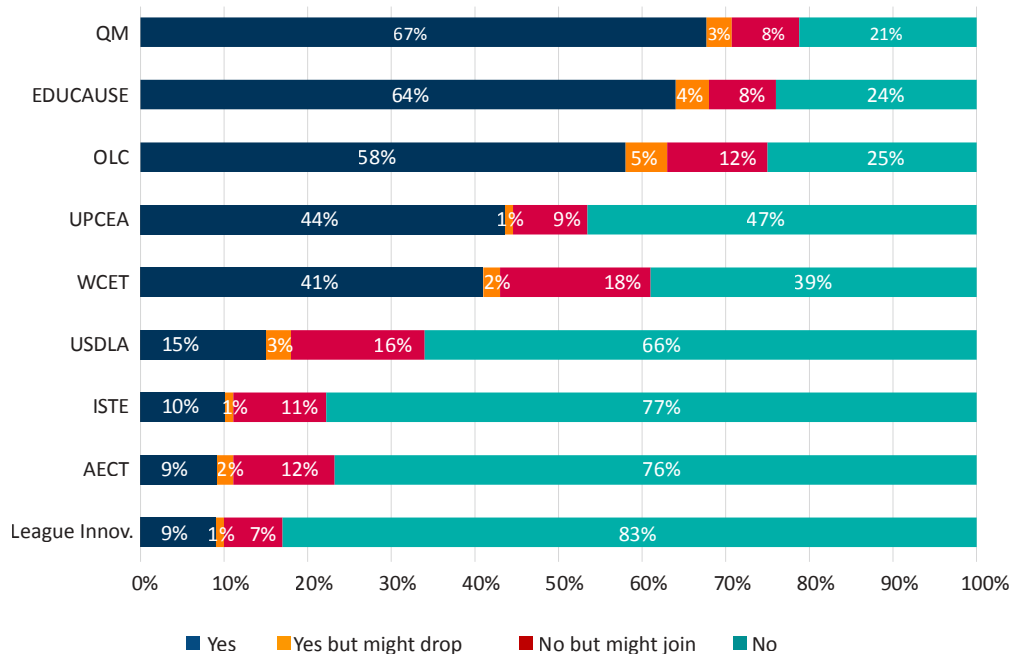
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We also asked open-ended questions about topics for their professional development. COLOs indicated that information on "AI" would be the most helpful (20%), followed by "financial management" (16%) and "working with faculty" (15%) (Figure 46).

Figure 46. Topics for COLO Professional Development

Topic	Percentage
AI	20%
Financial Management	16%
Working with Faculty	15%
Legal & Reg. Issues	14%
Marketing & Enrollment	14%
Leadership Development	10%
OL Trends / Future	10%
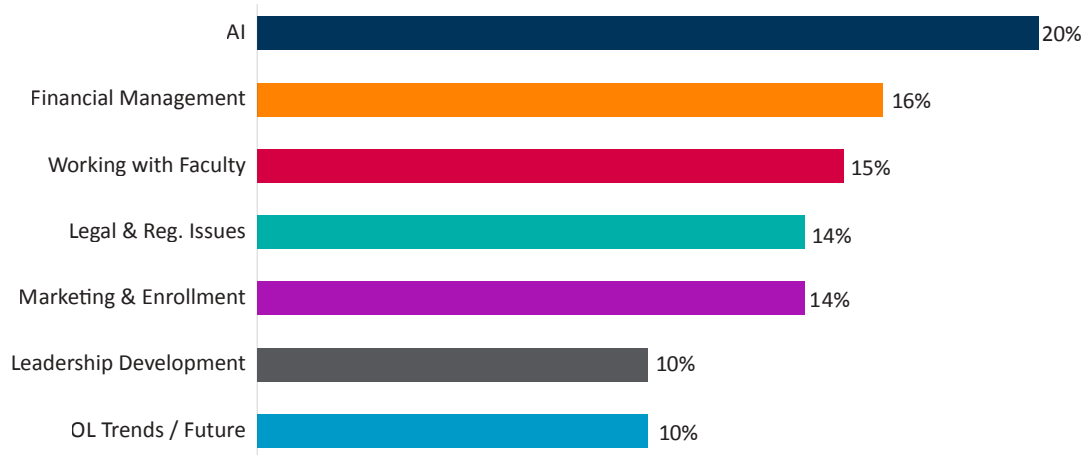
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Summary

This special study provided a much-needed update to the profile and role of the chief online learning officer. While this section in CHLOE offers important highlights, we encourage readers to review the more extensive journal article for a discussion of all the items. The key findings for readers are the COLO position reporting to academic leadership, the organizational alignment of specific functional units with the COLO, and a composite view of COLOs as seasoned leaders with a blend of relevant experience. These findings are generally consistent with prior studies. We believe that the "mainstreaming" of online learning in higher education, which has been emphasized in many CHLOE reports, is supported by the "mainstreaming" of COLO positions.

These results are germane for institutions, given the vital importance of their online learning activities. College and university leaders can consider how best to organize the institution, reflect on the qualities and experiences of leaders in this area, and how they can position this role for success. The findings are also relevant for individual COLOs. They can benchmark their current situations with those of their peers, identify adjustments that might be needed for their organizations, and identify additional academic or professional development opportunities that would be beneficial.

Reference

Fredericksen, E. E., Simunich, B., & Uranis, J. (In press.) COLO profiles & competencies 2024: A national research project about chief online learning officers. *Online Learning Journal, 29*(3).

ACKNOWLEDGEMENTS

Jeff Seaman, Ph.D., Director, Bay View Analytics

Morris Thomas, Ph.D., Provost, Wiley University

Robert Ubell, Vice Dean Emeritus, Online Learning, Tandon School of Engineering, New York University

Lori Williams, Ph.D., Executive Vice President & Chief of Staff, Excelsior University

Chief Online Learning Officers

Above all, we are profoundly grateful to the chief online learning officers nationwide who generously shared their knowledge and insights for CHLOE 10. We deeply value the ongoing participation of those who have contributed to multiple CHLOE surveys. The CHLOE project exists because of your willingness to share your experiences and data with the broader higher education community.

Bethany Simunich, Quality Matters

Richard Garrett, Eduventures Research

Eric Fredericksen, University of Rochester

Kristen Gay, EDUCAUSE

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