

Institutional Strategy & Partnerships

Synthesized from 12 sources 41 findings · April 18, 2026

Why This Matters

Small and mid-sized institutions are caught between two compounding pressures: academic leadership expecting online graduate enrollment growth that the market cannot deliver, and partnership structures that have left them operationally blind. With **87% of institutional leaders** tasked with growing online graduate enrollments (UPCEA 2024) against a forecasted average growth rate of just **1.1% through 2031** (UPCEA 2024), the institutions that survive this decade will be the ones that build real strategic and partnership infrastructure — not the ones that sign the next long-term revenue-share contract and hope for the best.

1. The Learner Who Already Knows What They Want — and Cannot Find It on Your Website

The learner at the center of this brief is a working adult who has already decided that more education is worth pursuing. **61% of current online learners say they are likely to enroll in another online degree program after finishing their current one** — up sharply from 48% in 2025 — and **56% express interest in non-degree programs** like certificates or micro-credentials (Risepoint 2026). They are not passive browsers. They arrive at your website with specific questions about cost and career outcomes, and they leave without answers: **51% expect to see tuition information on the first visit**, yet fewer than **43% report being able to find cost information easily** (EducationDynamics 2025). Career outcomes and employer association data — the two factors most likely to close enrollment decisions — are the hardest information to find on institutional websites (EducationDynamics 2025). The operational implication is blunt: your website is actively losing students your marketing budget already paid to attract.

2. The OPM Reckoning Is Real, and the Exit Requires a Plan

The shift away from traditional OPM revenue-share arrangements is no longer a theoretical trend — it is a structural realignment happening now. **60% of higher education leaders are actively reevaluating their OPM relationships** (Collegis Education 2025), and the UPCEA benchmarking data confirms why: **fee-for-service compensation models are now more prevalent at 68% of contracted arrangements versus 50% for tuition share** (UPCEA 2025), and satisfaction with fee-for-service partnerships runs at **77% compared to only 64% for revenue-share models**, with revenue-share generating a **31% dissatisfaction rate** (Chronicle/P3•EDU 2025). The dissatisfaction is grounded in something specific: traditional OPM structures leave institutions with no visibility into where money is being spent, which marketing investments are producing results, or what the enrollment funnel actually looks like (Collegis Education 2025). That is not a vendor problem — it is a governance failure that institutions allowed to persist.

The danger in the current moment is that institutions under financial pressure will exit one restrictive arrangement and immediately sign another. The Collegis framework is unambiguous on this point: any transition to external support post-OPM should include **unbundled services, contracts shorter than five years, full data transparency, and an explicit plan for transferring roles and responsibilities to internal staff over time** (Collegis Education 2025). Before an institution can credibly make that demand, it must assess its own readiness across five functional areas — Market Research, Marketing, Recruitment and Enrollment, Retention, and Academic Services — evaluated through the lenses of data capability, technology infrastructure, and internal talent (Collegis Education 2025).

Do not issue an RFP for post-OPM support until you have completed that readiness assessment internally. Run it within the next 60 days.

3. Certificate and Non-Degree Strategy Is Where the Growth Is — If You Build the Pathway

Graduate certificate enrollment grew **13.0% between Fall 2022 and Fall 2024**, vastly outpacing overall graduate growth of **2.1%** in the same period (UPCEA 2024). In individual markets, strategic investment can produce outsized results: in North Carolina, a single institution captured **more than 30% of all graduate certificate completions statewide and achieved greater than 250% growth over five years** (EducationDynamics 2025). This is not accidental — it is the result of deliberate program investment and market positioning before competitors moved.

The complication is that demand for non-degree credentials is real but fragile. **71% of learners agree non-degree programs help gain job-specific skills quickly, and 69% see them as a path to reskilling** — but **52% still worry that non-degree credentials are not highly valued by employers** (Risepoint 2026). The single most actionable insight in the data may be this: **67% of learners say non-degree programs would be more appealing if it were clearer how they could lead to a future degree, yet 48% are not familiar with that concept at all** (Risepoint 2026). Stackable pathways are not a marketing message most institutions have effectively communicated, and only **11% of learners cited stacking toward a degree as a top reason for interest in non-degree programs** — the lowest-ranked factor among all decision variables (Risepoint 2025). This is not evidence that stacking is unimportant. It is evidence that institutions have not explained it.

By the end of the current planning cycle, every certificate and micro-credential in your portfolio should have a documented, visible pathway to a degree — on the program page, in advisor scripts, and in inquiry nurture sequences.

4. Partnership Decisions Belong in the Senior Leadership Suite, Not the Vendor Queue

The appetite for public-private partnerships is growing, and the data suggests institutions are becoming more sophisticated about how they structure them. **74% of higher education leaders report that public-private partnerships are increasing at their institutions** — up 8 percentage points from 2024 — and **reservations about partnering with private companies have declined by the same margin, with only 33% now reporting concerns** (Chronicle/P3•EDU 2025). The leading partnership interests are workforce

development and employee training (63%), health and telehealth services (43%), artificial intelligence (40%), and marketing and recruiting (40%) (Chronicle/P3•EDU 2025).

What is driving these decisions is capability, not cost. **73% of institutional leaders cite unique competencies or services superior to in-house alternatives as the primary reason to pursue a private partnership**, and **55% point to speed of execution** (Chronicle/P3•EDU 2025). At a moment when master's programs are proliferating – the number increased **32% from 2017 to 2023 while average program size shrank 15%** (UPCEA 2024) – speed to market is a competitive differentiator that small institutions cannot afford to cede.

The capacity constraint is real on both sides. Only **65% of institutions believe they have the in-house skills to explore, engage, and manage private sector partnerships effectively**, and **66% already employ outside consultants or legal counsel** to execute them (Chronicle/P3•EDU 2025). Partnership execution is being led at the president, CFO, and provost level at most institutions (Chronicle/P3•EDU 2025) – which means operational staff are frequently being asked to implement agreements they had no hand in structuring.

Metric	Benchmark	Source
Institutions with partnerships increasing	74%	Chronicle/P3•EDU 2025
Satisfaction with fee-for-service partnerships	77% satisfied or very satisfied	Chronicle/P3•EDU 2025
Satisfaction with revenue-share partnerships	64% satisfied; 31% dissatisfied	Chronicle/P3•EDU 2025
Primary driver of partnership decisions	73% cite unique/superior competencies	Chronicle/P3•EDU 2025
Institutions lacking in-house partnership management skills	35%	Chronicle/P3•EDU 2025
Institutions already using outside counsel for partnerships	66%	Chronicle/P3•EDU 2025
Online enterprises contracting OPM/OPE services	Increased from 29% (2024) to 39% (2025)	UPCEA 2025
Fee-for-service vs. tuition-share prevalence	68% fee-for-service vs. 50% tuition share	UPCEA 2025

Assign a named internal owner for partnership evaluation and contract oversight – separate from the person who manages vendor relationships operationally – before your next RFP or partnership conversation begins.

5. Partnership Strategy Readiness Audit: From Assessment to Execution

Stage 1 – Institutional Baseline (Days 1–14)

- Convene president, provost, CFO, and online enterprise director for a 90-minute working session. Map every current vendor and OPM relationship: contract length, compensation model, data access rights, and

termination clauses.

- Flag any contract where the institution lacks visibility into the full enrollment funnel, marketing spend allocation, or performance by channel.
- Ownership: President's office initiates; CFO and online director prepare materials.

Stage 2 – OPM Readiness Assessment (Days 15–30)

- Complete the Collegis five-function readiness assessment across Market Research, Marketing, Recruitment and Enrollment, Retention, and Academic Services – scored against data capability, technology infrastructure, and internal talent.
- Score each area as Ready, Developing, or Deficient. Document specific gaps before any external partner conversations.
- Ownership: Online enterprise director leads; institutional research and IT contribute.

Stage 3 – Portfolio Demand Validation (Days 31–45)

- Run a market demand assessment on your top five to eight programs using Lightcast job growth and salary data, IPEDS saturation benchmarks, Google Trends regional search volume, and competitor landscape review (RNL 2025).
- Flag which programs have strong external demand signal versus which are sustained primarily by internal inertia.
- Ownership: Online enterprise director with enrollment management.

Stage 4 – Certificate and Pathway Architecture Review (Days 31–45, parallel)

- Audit every certificate and non-degree credential in your current portfolio. For each, document whether a stackable pathway to a degree exists, whether it is published on the program page, and whether front-line advisors can articulate it.
- Prioritize high-growth sectors where apprenticeship alignment is possible – Health Care (**906.5% ten-year apprenticeship growth**) and Finance and Insurance (**413.6% ten-year growth**) are highest priority (EducationDynamics 2025).
- Ownership: Academic affairs and online enterprise, jointly.

Stage 5 – Website and Enrollment Funnel Diagnostic (Week 6)

- Audit the top ten program pages for presence of tuition cost information, career outcomes data, and employer association details. Time how long it takes a first-time visitor to locate each.
- Benchmark against the finding that **fewer than 43% of prospective students can find cost information easily** (EducationDynamics 2025). Set a target of under two clicks from any program page landing.
- Ownership: Marketing director with enrollment management.

Stage 6 – Partner Selection Criteria (Week 7–8)

- Before issuing any RFP for marketing, recruiting, or OPM services, draft non-negotiable contract terms: contracts under five years, full data transparency including funnel-level reporting, unbundled service options, and a written transition-of-responsibilities plan.

- Assign a named internal partnership manager who will own ongoing relationship governance – distinct from the staff member executing the day-to-day work.
- Ownership: Provost and CFO, with legal counsel engaged at this stage.

Stage 7 – Cross-Functional Alignment and KPI Setting (Week 8–10)

- Convene admissions, marketing, academic leadership, and institutional research to align on program prioritization decisions and establish measurable KPIs for each program before any new marketing spend is authorized (RNL 2025).
- Build a simple dashboard – not a platform, a dashboard – that reports enrollment funnel performance, cost per enrollment, and revenue per student headcount against the UPCEA benchmarks for institutions of your size.
- Ownership: Online enterprise director leads; institutional research builds and maintains.

The single most important shift administrators at small and mid-sized institutions must make is this: stop treating partnerships as a procurement decision and start treating them as a governance decision. The data shows a market moving in the right direction – fee-for-service is displacing revenue-share, reservations about private partnerships are declining, and demand for certificates and non-degree credentials is measurably rising – but none of that momentum converts into institutional advantage without the internal infrastructure to direct it. The institutions that will capture disproportionate market share over the next five years are not the ones with the largest budgets; the smaller-scale data suggests **institutions with smaller headcounts are already generating higher average gross revenue per student than their larger peers** (UPCEA 2025). The question is whether your institution is building the internal capacity to act on that advantage – or outsourcing the decision to a vendor who will answer that question for you.

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