Developing a competitive online learning presence requires higher education CIOs to evaluate institutional effectiveness and to take steps to increase online learning maturity. Gartner’s higher education online learning maturity model provides a framework for doing this.

Overview

Key Challenges

- Online learning offers potential to access quality education at scale. However, many different approaches are available that must continually evolve to provide competitive online learning.

- Delivery of an online learning strategy requires higher education leaders to systematically optimize and transform technologies, instructional models and student experience.

- Institutions must evaluate and evolve online learning effectiveness through five levels of maturity: exploration, migration, optimization, differentiation and transformation.

Recommendations

Higher education CIOs responsible for education technology optimization and modernization digital transformation and innovation should use the online learning maturity model to:

- Evaluate the current institutional online learning maturity by comparing the current institutional state to the descriptions of each maturity level and institutional “online learning ambition.”

- Optimize the institution’s position by measuring maturity year on year and then ensuring accountability for consolidation and improvement.

- Progress to higher online maturity levels by building on current capabilities, aligning with market needs, and addressing cultural and learning technology changes.

Introduction

Online is increasingly accepted as a valuable potential vehicle for learning, with three-quarters of instructors who have taught online believing it can enhance teaching quality. In 2020, the COVID-19 crisis caused global institutions to rapidly adopt online learning for instructional continuity. In
parallel, the pandemic highlighted the complexities of online learning design and the challenges of online learning success.  

Effective online learning delivery demands the alignment of learning technologies and learning designs with institutional, subject-specific and student needs. Institutions delivering online must combine core learning technology components such as the learning management system (LMS), content and collaboration tools to deliver learning experiences both online and on campus. The process of designing online learning tools and techniques remains new to many institutions, and good practices may take time to evolve.

Approaches to online learning across institutions can be compared by reviewing:

- **Strategic value of online learning** — What models of online learning are appropriate for the institution?
- **Online learning approach** — What is the role of online learning within the institution?
- **Technology and operations** — Which components are available, and how well are they combined and delivered?
- **IT focus** — How well does the IT department contribute to online learning effectiveness?
- **Faculty** — How committed are faculty to online teaching models?
- **Senior leadership commitment** — Is online learning seen as a novelty or a strategic imperative?
- **KPIs** — How does online learning connect to measures that drive ongoing investment (such as student experience and retention or institutional profitability)?

Analysis of these factors can be combined into the Gartner higher education online learning maturity model, as illustrated in Figure 1.

**Figure 1: The Gartner Higher Education Online Learning Maturity Model**
The Gartner Higher Education Online Learning Maturity Model

<table>
<thead>
<tr>
<th>Strategic Value of Online Learning</th>
<th>1: Exploration</th>
<th>2: Migration</th>
<th>3: Optimization</th>
<th>4: Differentiation</th>
<th>5: Transformation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Novelty</td>
<td>Credible option</td>
<td>Accepted as</td>
<td>Competitive to</td>
<td>Distinctive and</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>core</td>
<td>other institutions</td>
<td>unique</td>
<td></td>
</tr>
<tr>
<td>Online Learning Approach</td>
<td>Isolated experiments</td>
<td>Individual programs</td>
<td>Co-ordinated systems, people, practices</td>
<td>Agile adaptation of offer to market</td>
<td>Business model and market reinvention</td>
</tr>
<tr>
<td>Technologies and Operations</td>
<td>No standardized processes or tools with custom course designs</td>
<td>Centralized policies, tools and training but erratic adoption</td>
<td>Refined institutional processes; some standardization</td>
<td>Accepted core processes and products; shared good practices</td>
<td>Evolving ecosystem aligned to institutional outcomes</td>
</tr>
<tr>
<td>IT Focus</td>
<td>Project-centric use of in-house IT</td>
<td>Local IT-support with use of outsourcing/OPM</td>
<td>Course-centric IT with targeted outsourcing</td>
<td>Learner-centric with IT as online learning partner</td>
<td>Ecosystem-centric maintenance and improvement</td>
</tr>
<tr>
<td>Faculty</td>
<td>Curiosity with little focus on student services</td>
<td>Limited acceptance</td>
<td>Strong engagement</td>
<td>Embedded competence</td>
<td>Confidence and innovation</td>
</tr>
<tr>
<td>Senior Leadership</td>
<td>Not engaged</td>
<td>Aware and increased central marketing focus</td>
<td>Acceptance with centralized budget model</td>
<td>Alignment and commitment</td>
<td>Active engagement and accountability for results</td>
</tr>
<tr>
<td>KPI (Examples)</td>
<td>Number of online courses</td>
<td>Online learning revenue</td>
<td>Number of programs/credit hours online</td>
<td>Student success, speed to market and market share</td>
<td>Profitability growth</td>
</tr>
</tbody>
</table>

Source: Gartner
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The maturity levels are typically both:

1. Progressive — Competencies at lower levels support those at higher levels.

2. Transient — Continuous evolution of technology and market practices means that all levels must be maintained and improved to preserve a given level of maturity.

It is possible to invest to accelerate to higher maturity levels, but it is vital to support such transitions with appropriate institutional capabilities, investments and cultural change. During COVID-19, many institutions moved rapidly to models of online learning for instructional continuity at Level 2. However, such institutions must now analyze appropriate and sustainable levels of online learning maturity moving forward. For many institutions, students and faculty have accepted online learning as a necessity in the initial response to the pandemic, but are not yet committed to it by choice. As a result, some institutions that have accelerated to higher levels of
maturity due to the pandemic risk will lose these positions unless action is taken to preserve and enhance their maturity level.

Analysis

Level 1: Exploration of Online Learning Potential

*Online learning curiosity without vision or strategy*

At this stage, online learning remains a novelty. Isolated projects and experiments are driven by centralized IT or by curious faculty creating custom-made, yet isolated, online learning interventions on a small number of programs. Examples may include:

- Flipped classrooms — content delivery in advance of live classroom delivery to encourage deeper exploration of context when together
- Certificate programs — MOOCs or short courses to complement or act as marketing for core programs
- Isolated activities on core programs — modules, simulations or classes led by individual faculty groups

This is a critical stage in building institutional awareness and credibility of online learning. However, while there may be a strong ethos of exploration, experiments are uncoordinated. This creates little opportunity for coordinated review and little energy for institutional adoption. There is an absence of instructional design capability and no coordinated external marketing of online programs and courses. A lack of centralized ownership and an absence of process results in limited connection between online learning activities and institutional success. Online learning revenue goes to individual units, and senior leadership outside of IT has no real awareness of internal online learning activities. Appreciation of the online learning sector is also limited. Senior leadership expectations of online learning are as likely to be shaped by the press or online performance of competitors as by results of internal projects.

Many universities have historically limited online learning to Level 1, as they may:

- Strongly favor face-to-face methods and pedagogies as part of their core identity
- Lack either the budget or the capabilities to deliver online
- See limited benefit or need to move toward online learning development

Even in these cases, however, it is important to evaluate current online learning maturity and assess its potential impact on future institutional ambitions.
Progress through Level 1 can be measured by the volume of online learning activities (typically number of courses, projects or experiments). Overall, however, this first level tends to be just a stepping-stone toward higher levels of online learning maturity.

How to Move to Level 2

- Develop initial online strategy (see “Develop an Online Learning Strategy Before Launching Online Programs in Higher Education”), and build a vision that connects to institutional culture and priorities.
- Focus on programs rather than isolated courses.
- Work with faculty and college leadership to create a business case for improvement.
- Build up instructional design and IT support structures, outsourcing where necessary.
- Evaluate online learning spend and potential budget models.
- Build senior leadership understanding by showcasing good practices in online learning.

Level 2: Migration to Online Learning

*Online learning discovery and scale from on-campus templates*

The second level of online learning maturity involves migration of face-to-face models to online. Motivations for this migration vary and may be driven by faculty entrepreneurialism, senior leadership or market opportunity. Many institutions have rapidly moved to Level 2 in the face of COVID-19.

Institutions at Level 2 have historically tended to leverage the curiosity of Level 1 experiments to build confidence and some sense of institutional need. Noncore courses may have been used to build online learning confidence with some faculty. A diverse range of online activities may also have started to emerge. Online approaches at Level 2 become more widespread, with a stronger centralized marketing focus geared toward attracting student revenue. Institutional capabilities may lag behind this marketing effort and outsourcing, consultants and online program management (OPM) companies are used to accelerate delivery.

Senior leadership becomes aware of the need for online learning, although commitment and understanding of the complexities of delivering online remain limited. Across the institution, online learning transitions from an isolated novelty toward a more widely accepted option. IT begins to shape the online learning agenda by:

- Encouraging adoption of critical components such as the LMS
- Developing initial processes and policies for use of these products
- Coordinating centralized communication and basic training on good practice
The introduction of IT-led processes and core online learning tools offer opportunities to provide more consistent online learning experiences across the institution. However, Level 2 is fueled more by enthusiasm and faculty entrepreneurialism than consistency. Lack of central control leads to inconsistent design style and program quality. Personalized faculty support from IT is needed. Limited instructional design support and low faculty familiarity with online learning design lead to variable quality of teaching and learning. Assessment is also erratic, with desires to duplicate physical examination environments stimulating an interest in proctoring and remote supervision.

Faculty accept online learning, but their enthusiasm is divided and faculty relationships with external OPMs are tense. Some faculty have become strong advocates keen to innovate with online. Many more are cautious, and reluctant to migrate to a new teaching and learning experience. These anxieties lead to debates about faculty payment and even IP ownership of content that may limit the maturity of some institutions to this level unless appropriately addressed. Although crises such as COVID-19 may temporarily put these faculty tensions aside, these issues still must be addressed to transition to higher maturity levels.

Progress through this level can be measured by exploring the amount of revenue generated from online activities or by exploring the number of faculty teaching online as a proxy for online acceptance. Metrics may also include the levels of faculty engagement and the usage of IT-delivered core learning technologies such as the LMS, collaboration tools and curriculum management systems.

At Level 2, metrics tend to relate more to utilization than usability or learner impact.

**How to Move to Level 3:**
- Refine institutional-level online learning strategy.
- Drive standardization of critical technologies.
- Enhance in-house instructional design capabilities.
- Evaluate budget model and processes to centralize online learning investments.
- Establish the need for alternative approaches of assessment beyond variants of face-to-face.
- Address barriers to faculty adoption such as training, support and payments.

**Level 3: Optimization of Initial Online Learning Practices**
At the third level of maturity, online learning becomes a core part of learning delivery within the institution. Isolated online learning efforts converge into a more unified institutional approach with more consistent technologies, evolved processes, strong marketing investment and evolved student support. Connections are made between online learning systems, teams and practices. IT adopts a role as coordinators of online learning, creating standardized components, gathering feedback, distilling insights, providing widespread online learning training and supporting adoption of appropriate new ideas.

Good practices in the use of online learning emerge and are cascaded across the institution with an ethos of “build once, use many times” to support activities from fully asynchronous to fully synchronous online learning. Core online platforms for areas such as learning management, curriculum management, video content management and web conferencing become established, but large numbers of additional systems are also present. Templates in appropriate use of learning technologies are shared among faculty in an attempt to ensure consistent experiences between courses and programs. This standardization and optimization process is critical to manage costs, given the growing number of disparate systems, policies and practices that now combine to deliver online learning across the institution.

Centralized guidance and processes are complemented with institutionwide communities of practice engaging those faculty and staff applying online learning. This interconnection of centralized policy and dispersed localized practice creates a cycle of continuous improvement in online learning.

The core tools and techniques of online learning at Level 3 transition from “novel” to “normal.”

Faculty commitments to online learning increase demands on the now multidisciplinary central team supporting program delivery. New skills are introduced through larger teams of instructional designers, web and graphic designers, trainers, program managers, support staff, and multimedia producers. These teams work closely with faculty to lead change and build capability. The range of skills needed to support online learning creates questions about the need for external partnerships to accelerate progress (see “Market Guide for Online Program Management in Higher Education”). Outsourcing is now adopted on a more targeted basis for specific needs in order to balance costs with internal skills, cultural adoption of online learning and speed to market.

Faculty online learning capabilities are developed through formal training programs and access to a pool of online pedagogical resources. Student online learning experiences remain variable, with
some faculty keen to incorporate new technologies and approaches, but others still translating face-to-face models to online. Faculty continue to try and take physical examinations online, but interest in leveraging assessment to better support student learning also evolves. This leads to initial exploration of learning analytics for student success.

Some faculty online advocates are keen to embrace open-source products and short-term trials without consideration of longer-term impact. This creates challenges of both control and longer-term IT investment, with curiosity and novelty potentially threatening standardization and pedagogy. In response, IT starts to adopt bimodal IT to balance needs for innovation with development of core platforms (see “Use Bimodal and Pace-Layered IT Together to Deliver Digital Business Transformation”).

Senior leadership now accepts online learning as a core activity and becomes involved in both funding discussions and policy tensions between departments to ensure budgets flex to accommodate overall needs.

At this level, online learning has evolved to a set of people, products and practices that combine to create online learning experiences. Institutional processes are broadly adhered to, and faculty engage with online learning design and delivery. As a result, metrics of online learning transition toward measures of number of programs online, as well as quality of teaching and learning. Student feedback increases in importance and is seen as an important measure of quality by prospective students. Such measures reinforce the importance of online learning to faculty, who become more committed to online delivery and more engaged in their future development of tools and techniques.

How to Move to Level 4

- Develop and implement standards for online learning systems to reduce waste and cascade good practice.
- Partner with faculty to prioritize enhancements to core learning technologies and articulate future aspirations.
- Accelerate online program and curriculum approval process.
- Transition focus to unique benefits of online, rather than simple face-to-face replacements.
- Invest less on marketing and more in market research to support new market-driven online programs.
- Build consensus on online learning issues across the institution through communities of practice, shared knowledge bases and centralized support.

Level 4: Differentiation of Online Learning Approach

*Online learning as streamlined delivery and core capability*

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At Level 4, online learning starts to become a more distinctive offer for the institution. Processes, people and platforms now align to deliver a consistent learning experience comparable to leaders in the online learning market. This leads to a strong focus on both market research and marketing to ensure differentiation from other high-quality online programs. Student experience and success are key components of this offer.

Learning technologies are not just deployed, but continuously adapted by IT, in partnership with faculty in response to learner and faculty feedback. Production values across the institution are consistent and of high quality. Curricula and programs flex, allowing the institution to start aligning offers to match individual and market needs. Personalization is supported by institutional research into learner analytics, which allow flexible pathways to emerge. These may also lead to exploration of stackable credentials that build to more substantive qualifications. Some custom-made online offers are designed with remote learners as a priority.

Online learning is widely accepted by faculty as a credible alternative to face-to-face and seen by students as a valued pathway. Faculty are expected to have strong online teaching capabilities and to contribute to the design and evolution of online learning models. This leads to high quality of online learning delivery, and the price for online and on-campus modes is similar.

Core processes are now accepted, but desires for continuous innovation lead to disputes about when to evolve systems or to prioritize new development projects. Debates emerge between faculty, instructional designers and IT about the ownership and priorities of online learning systems. The ownership of online learning becomes a critical issue and may ultimately fall under the control of:

- IT, owned and led by the CIO
- Faculty, owned and led by the most senior member of faculty responsible for teaching and learning
- A head of online learning, owned and led independently of IT and faculty

This owner will lead a multidisciplinary team and will coordinate discussions across the institution to integrate academic, technology and learning design expertise.

Senior management now recognizes the significance of online learning to the institution and is committed to its ongoing evolution. Online learning effectiveness forms part of regular teaching and learning discussions across the institution and is a subject of debate with senior leadership. Discussions evolve from anxiety about the costs of online learning toward how best to generate new value at a similar price point to on-campus. Custom designs and faculty acceptance lead to online delivery being seen as an equivalent part of the portfolio.

Measures of success transition from technology or operational metrics toward market share and speed to market. Progress at this level may also be measured by student success metrics as
indicators of the effectiveness of online experience.

**How to Move to Level 5**

- Build a culture of online learning quality and continuous improvement with faculty and senior leadership.
- Focus on personal learning experience.
- Develop modularized curriculum and reusable content.
- Invest in market research to build an online market.
- Develop a process for ending programs when they are no longer meeting market needs.
- Think digital rather than on-campus first design.

**Level 5: Transformation of Online Learning Models**

*Digital-first design and market leadership*

At Level 5, online learning evolves from core to become an offer that is market leading and essential to the success of the institution. Business models associated with online learning are distinctive to the institution and clearly differentiated from others. Level 5 is about digital-first design, rather than digital variants of on-campus models.

At this level, the institution combines:

- An ecosystem of reliable components to support custom-made learning needs
- Established and embedded faculty online capabilities
- Institutional ability to optimize and recombine learning components to build online experience
- A distinctive offer and position in the market associated with online learning innovation

This distinctive position may be hybrid between the extremes of on-campus or online but creates both institutional impact and individual learning experiences.

**Online learning maturity is defined not just by technology, but by institutional market position, individual student experience, and quality of teaching and learning.**
Faculty are now familiar with core systems and leverage a consistent set of approved components and templates without significant levels of support. Success stories are shared regularly internally and externally, and distinctive online teaching practices are recognized through teaching awards. Faculty are no longer limited to fixed training courses for online delivery, but work continuously with IT to develop innovative models of education for the digital world. Fusion teams blending multiple disciplines now focus on products, rather than isolated projects, to seed innovation (see “Fusion Teams: A New Model for Digital Delivery”). IT is an active partner with faculty as in-house learning labs continuously evolve technologies and teaching practices to address learner needs.

The IT team continuously refreshes the online learning ecosystem of products to deliver a market-leading online learning experience. This ecosystem is less about individual products and more about a connected learning platform to engage learners.

Strong content management practices enable efficient reuse of assets. This reuse creates faculty capacity to develop new research and to explore new teaching models. Integration, interoperability and data flow between systems become critical and support an overall view of student analytics to develop flexible learning pathways (see “Top 10 Business Trends Impacting Higher Education in 2020”). Through this process, the unique online learning experience attracts students to the institution. Institutions actively carry out detailed market research to develop digital differentiation of their position, and market successful metrics of student engagement and success.

Senior leadership is actively involved in online learning strategy, both driving further innovation and taking accountability for the results achieved. Online becomes a core part of the portfolio and is a regular item on the board agenda. Measures of success include institutional profitability, the effectiveness of new business models and the rate of reinvention of the online experience.

Developing Level 5 maturity in online learning is comparatively rare due to the challenges of progressing through each level, as outlined in Figure 2.

Figure 2: The Path to Level 5 Higher Education Online Learning Maturity
Preserving Level 5 maturity is challenging due to the large number of factors that need to be balanced. All of the key factors of the maturity model continue to evolve, and the competitiveness of the online learning market demands continual effort if maturity is to be maintained.

To preserve Level 5:

- Assess what constitutes “world class” in higher education online learning and strive to exceed it.
- Evaluate the position of your institution in higher education and how a new online learning or hybrid offer might strengthen competitiveness.
- Balance marketing and market research to optimize digital differentiation of the online offer.
- Ensure that the online learning vision aligns and delivers on the institutional value proposition.
- Design new business models that connect faculty skills, the learning ecosystem and student experience to create distinctive value.

Analyzing and Evolving Your Position
The need to combine technology, culture, capabilities and market impact mean that development of strong online offers at an institution can take many years to deliver effectively (see, for example, “Case Study: Digital Transformation Journey (University of Central Florida)” or “Southern New Hampshire University Delivers a Transformative Digital Education Model”). However, the challenges to established higher education models created by COVID-19 now stimulate a need for urgent evaluation of fit between online learning maturity and proposed new models of learning planned by your institution. The desired online learning position for institutional success informs appropriate levels of the seven key factors explored at each level:

- Strategic value of online
- Online approach
- Technology and operations
- IT focus
- Faculty engagement
- Senior leadership commitment
- Quality of outcomes

The combination of these factors can be evaluated against institutional plans and compared to a target competitive position. Evaluation of gaps between actual and aspirational positions then informs priorities for improvement from the maturity model, as illustrated in Figure 3.
Higher education institutions will go to market with multiple different offers and must align their online learning strategies to their distinctive positions. An on-campus institution that appropriately aligns online solutions to enrich the on-campus learning experience may still achieve distinctiveness; this is an indicator of overall differentiation, rather than a purely online focus. High levels of purely online maturity will be the goal for some. For others, appropriate use of technology and its integration with face-to-face learning may be the path to success.

Each institution must define its optimal position and then prioritize improvements as needed to improve online learning maturity. Higher education CIOs should, therefore, use the online learning maturity model to:

- Evaluate current institutional online learning maturity by mapping current activities, systems, capabilities and effectiveness against the five maturity levels.
- Assess maturity against desired position and competitors in target markets.
Optimize current performance by measuring maturity year over year and ensuring accountability for delivery and improvement.

Progress to higher online maturity levels by building on current capabilities, aligning with market needs and following the good practices outlined in this note.

Consider the relative merits of internal development against commissioning external consultancy or OPM support to build online learning competencies.

Balance any commitments to external providers with internal activities to ensure online capabilities and offers are developed, refined and accepted within the institution.

Recognize that online learning maturity is transient and may erode over time without maintenance.

Consolidate and build on current maturity levels to align online learning priorities with institutional needs.

Ensure that institutional capabilities, faculty acceptance and senior leadership support develop to ensure maturity levels become embedded, rather than reverting to lower levels.

Evidence
1 “Inside Higher Ed's 2019 Survey Of Faculty Attitudes on Technology.” Inside Higher Ed

2 “The Difference Between Emergency Remote Teaching and Online Learning,” EDUCAUSE Review

Recommended by the Authors
Case Study: Digital Transformation Journey (University of Central Florida)
Develop an Online Learning Strategy Before Launching Online Programs in Higher Education
Fusion Teams: A New Model for Digital Delivery
Market Guide for Online Program Management in Higher Education
Southern New Hampshire University Delivers a Transformative Digital Education Model
Toolkit: Managing Instructional Continuity in Higher Education
Top 10 Business Trends Impacting Higher Education in 2020
Use Bimodal and Pace-Layered IT Together to Deliver Digital Business Transformation

Recommended For You
Summary Translation: Market Guide for Servers
Implement Security Governance Automation (JPMorgan Chase)