Two big questions...

1) Does online learning sideline state higher education policy?

2) What would a smart state online learning policy look like?
Online scrambles the coordinates.
The borders of U.S. higher education

15%

Source: Eduventures analysis of IPEDS data.
The borders of U.S. higher education

32%

Source: Eduventures analysis of IPEDS data.
How many students are there really?

U.S. Undergraduates
Fall 2017 vs. 2016-17

22.4m
(2016-17)

16.9m
(Fall 2017)

Gap of 33%

Hidden Online Scale.
For the 689 schools where >20% of undergraduates study fully online, the gap is…

51%
Borderless higher education

Residents Enrolled in Out-of-State Online Programs 2017-18
(undergraduate and graduate combined- rounded ‘000s)

Source: Eduventures analysis of IPEDS and NC-SARA data. Fall enrollment converted to 12-month unduplicated.
Winners and Losers Online—how to tell?

Residents Enrolled in Out-of-State Online Programs 2017-18 as % of Resident In-State Online Students (undergraduate and graduate combined—rounded ‘000s)

Source: Eduventures analysis of IPEDS and NC-SARA data. Fall enrollment converted to 12-month unduplicated.
Online broadens horizons for your state residents

Source: Eduventures analysis of IPEDS and NC-SARA data. Two and four-year schools. First-time, full-time population are high school graduates within the prior 12 months (Fall 2016). Online students are all ages, and combine undergraduates and graduate students. (2017-18)
How many schools does it take to enroll half of the out-of-state students in the U.S.?

In 2016, it took 169 schools to enroll half of the 1.7 million first-time, full-time undergraduates out of-state.

In 2018, it took just 11 schools to enroll half of the 1.2 million online undergraduate and graduate students out of-state.

Source: Eduventures analysis of IPEDS (2016 - most recent year available) and NC-SARA data (2017-18 - NC-SARA does not distinguish between undergraduate and graduate students). Two- and four-year schools.
The Battle for Connecticut.
In 2017-18, SNHU enrolled 2,539 online students in CT. All out-of-state schools enrolled almost 13,000 CT residents online.

In 2017-18, public CT schools enrolled c.6,000 CT residents online (rising to c.12,000 for all CT schools).
In 2017-18, CTSU schools enrolled 17% of all students at CT schools, but only 1.5% of CT residents in online programs (370 students).

Source: Eduventures analysis of IPEDS and NC-SARA data. Undergraduate and graduate enrollment combined.
What’s going on in Connecticut?

**Adult & Online Enrollment in Connecticut** (2013 vs. 2017)

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>In-State Adult</th>
<th>In-State Online</th>
<th>Out-of-State Online</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enrollment Growth</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adult UG 4Y NP</td>
<td>-9%</td>
<td>2,400</td>
<td>13,000</td>
</tr>
<tr>
<td>Adult UG State Us</td>
<td>-8.5%</td>
<td>6,000</td>
<td>53%</td>
</tr>
<tr>
<td>Charter Oak Adult Grad State Us</td>
<td>-5%</td>
<td>5,000</td>
<td>48%</td>
</tr>
<tr>
<td>Adult Grad-4Y NP</td>
<td>-3.0%</td>
<td></td>
<td>4,200</td>
</tr>
<tr>
<td>Post U-UG &amp; Grad</td>
<td></td>
<td>4%</td>
<td>1,500</td>
</tr>
<tr>
<td>Online UG-4Y NP</td>
<td></td>
<td>15%</td>
<td>320</td>
</tr>
<tr>
<td>Online Grad- State Us</td>
<td></td>
<td>39%</td>
<td>4,800</td>
</tr>
<tr>
<td>Online Grad-4Y NP</td>
<td></td>
<td>4%</td>
<td>1,500</td>
</tr>
<tr>
<td>Online Grad- State Us</td>
<td></td>
<td>25%</td>
<td>150</td>
</tr>
<tr>
<td>Online UG- State Us</td>
<td></td>
<td></td>
<td>4,800</td>
</tr>
<tr>
<td>Online OOS SNHU &amp; Grad in CT</td>
<td></td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>In-Region SNHU Online in CT</td>
<td></td>
<td></td>
<td>2,500</td>
</tr>
</tbody>
</table>

Source: Eduventures analysis of IPEDS and NC-SARA data. 12-month unduplicated headcount-reported and estimated.
Develop Talent

59%

of CT residents aged 25-44 do not have a bachelor’s

Diversify Enrollment

-27%

drop in CT high school graduates (2011-2031P)

Widen Opportunity

3rd most unequal

CT is the 3rd most unequal state in the U.S.

Connecticut has a plan... do you?
Connecticut has a plan: *Students First*
Connecticut has a plan: *Students First*

**Administrative Consolidation - System Wide**

Objective: A single administrative infrastructure to eliminate redundant functions system wide and provide shared services to all universities and colleges.
Connecticut has a plan: *Students First*

**Organizational Consolidation - Community Colleges**

**Objective:** One centrally managed college with campuses statewide
Connecticut has a plan: *Students First*

Student Success Centers
AND GUIDED PATHWAYS
But what about online? Connecticut is working on a plan

Under discussion include:

- Systemwide online course/program **quality assurance**
- Systematic development of **in-demand online programs** across the system
- **Cross-institutional** courses and programs
- Exploration of **blends of online and in-person**
- **Scrapping** application fees
- Emphasize **good value** of in-state programs
What would a smart state online learning policy look like?
What are the two most common state online learning policies?

QUALITY ASSURANCE AND IMPROVEMENT IN HIGHER EDUCATION: THE ROLE OF THE STATES

MAY 2019

NO POLICY?
The Battle for Value: Local vs. National Online

Go SNHU! The National Case
- Wide range of programs, in one place!
- Superior technology and services!
- Economies of scale - lower prices!
- More choice and competition!

Go CT State! The Local Case
- Blended learning and in-person support!
- Targeted programming!
- Leverage campus assets, state funding!
- Keep higher ed spending local! Better value!
The Battle for Value: Local vs. National Online Markets

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