



# The Battle for Value

## National vs. Local Online Markets

Richard Garrett | *Chief Research Officer*

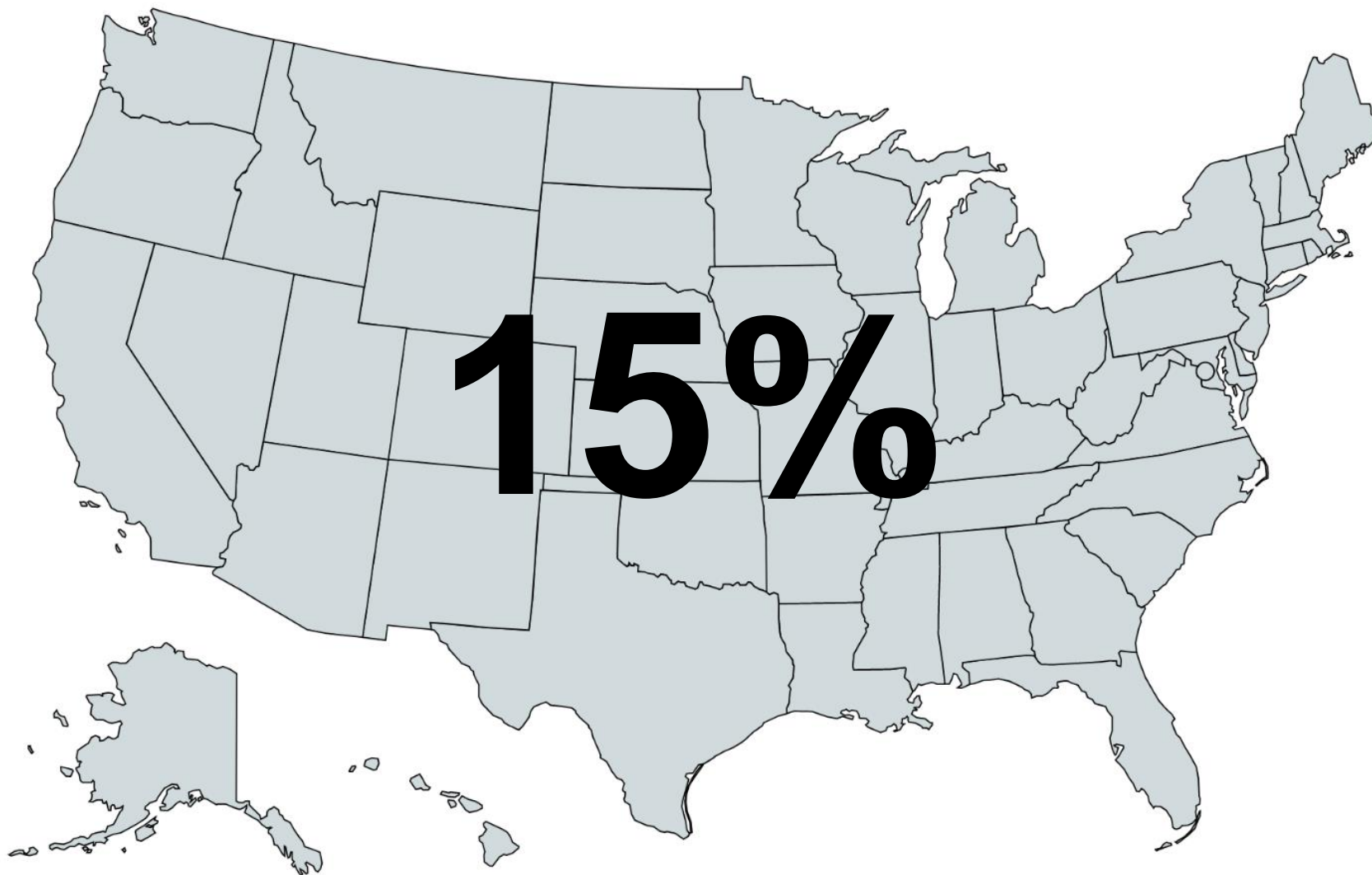
## Two big questions...

- 1) Does online learning sideline state higher education policy?
- 2) What would a smart state online learning policy look like?

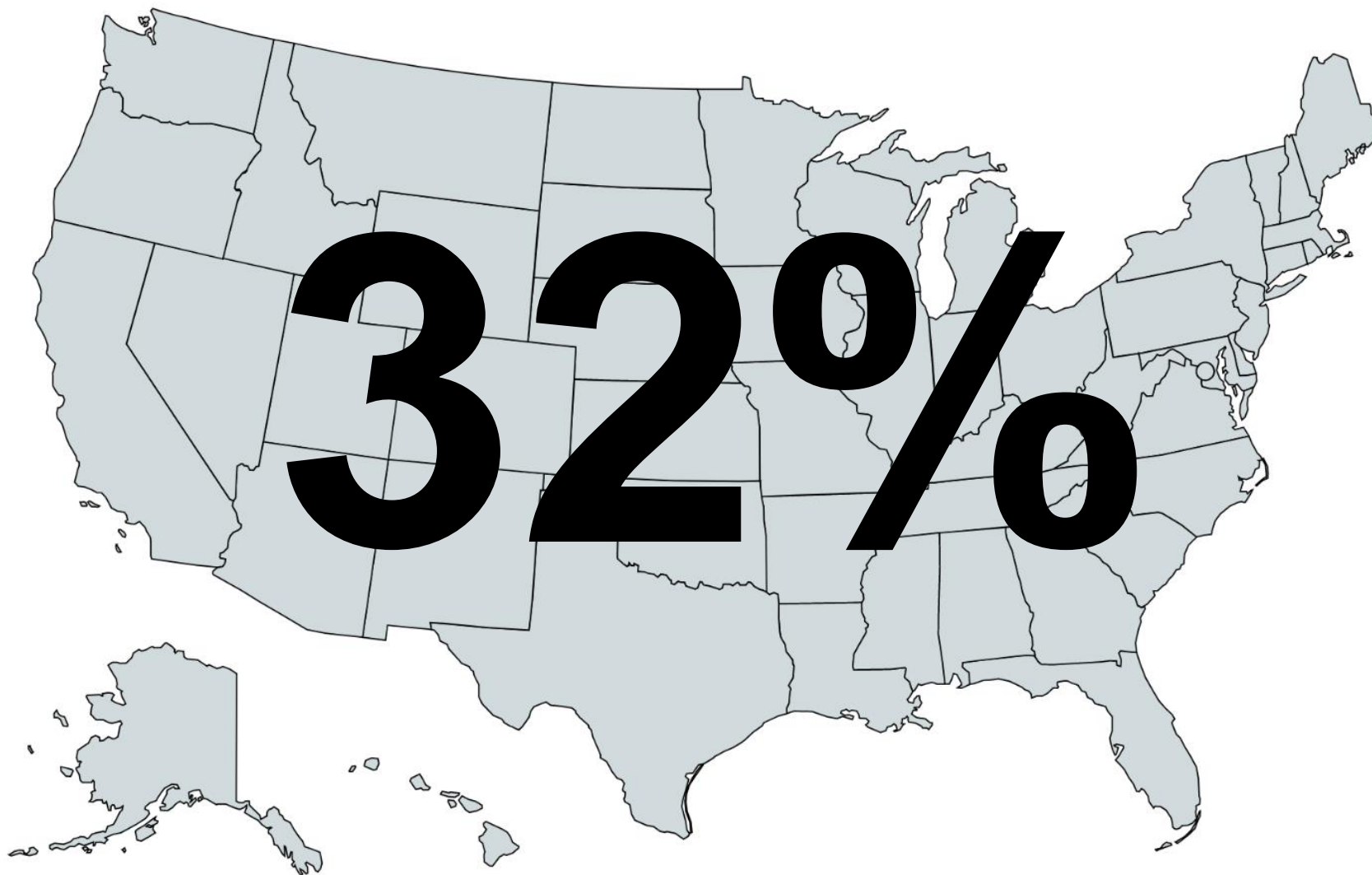


Online scrambles the  
coordinates.

## The borders of U.S. higher education



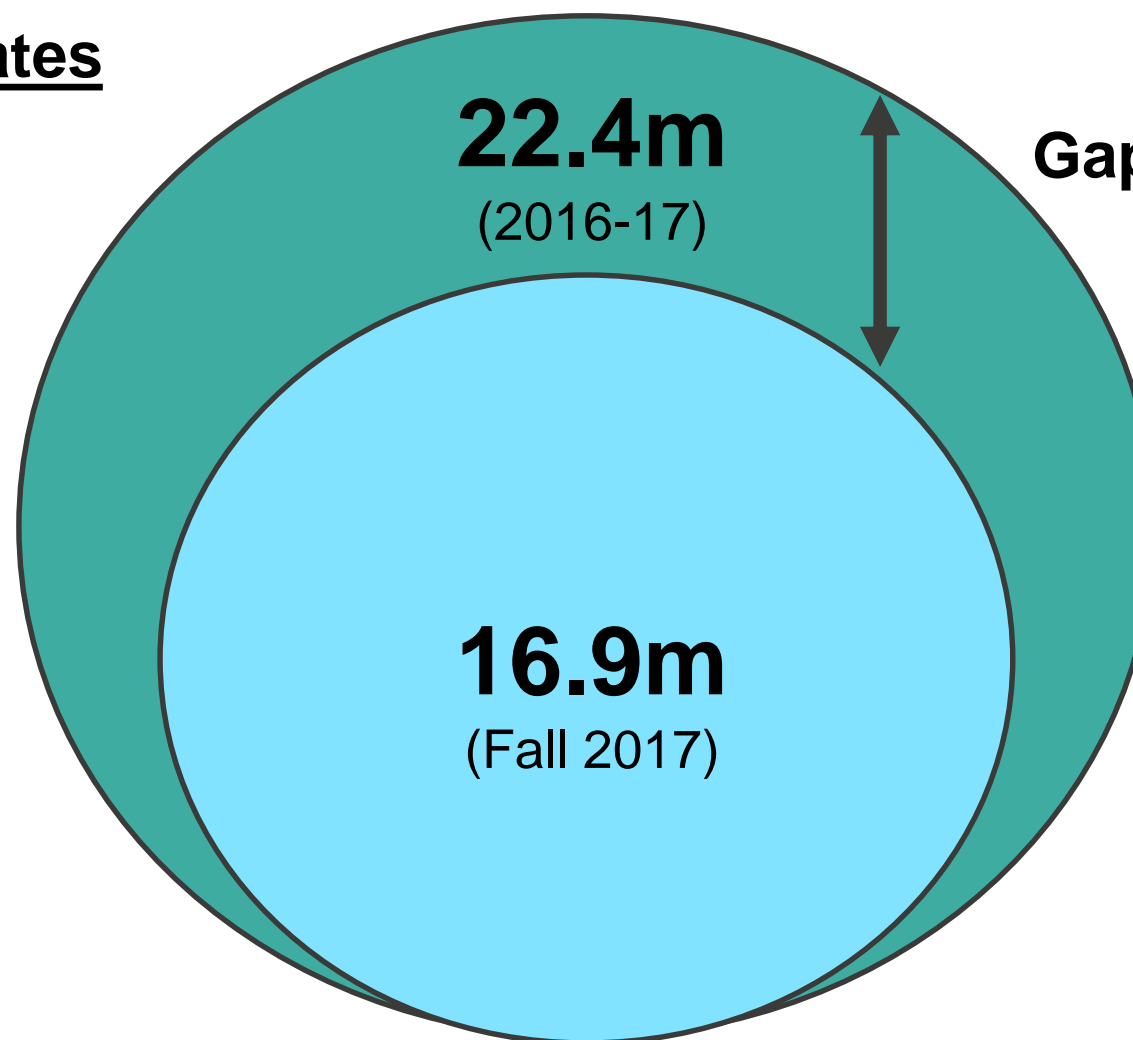
## The borders of U.S. higher education



# How many students are there really?

## U.S. Undergraduates

Fall 2017 vs. 2016-17

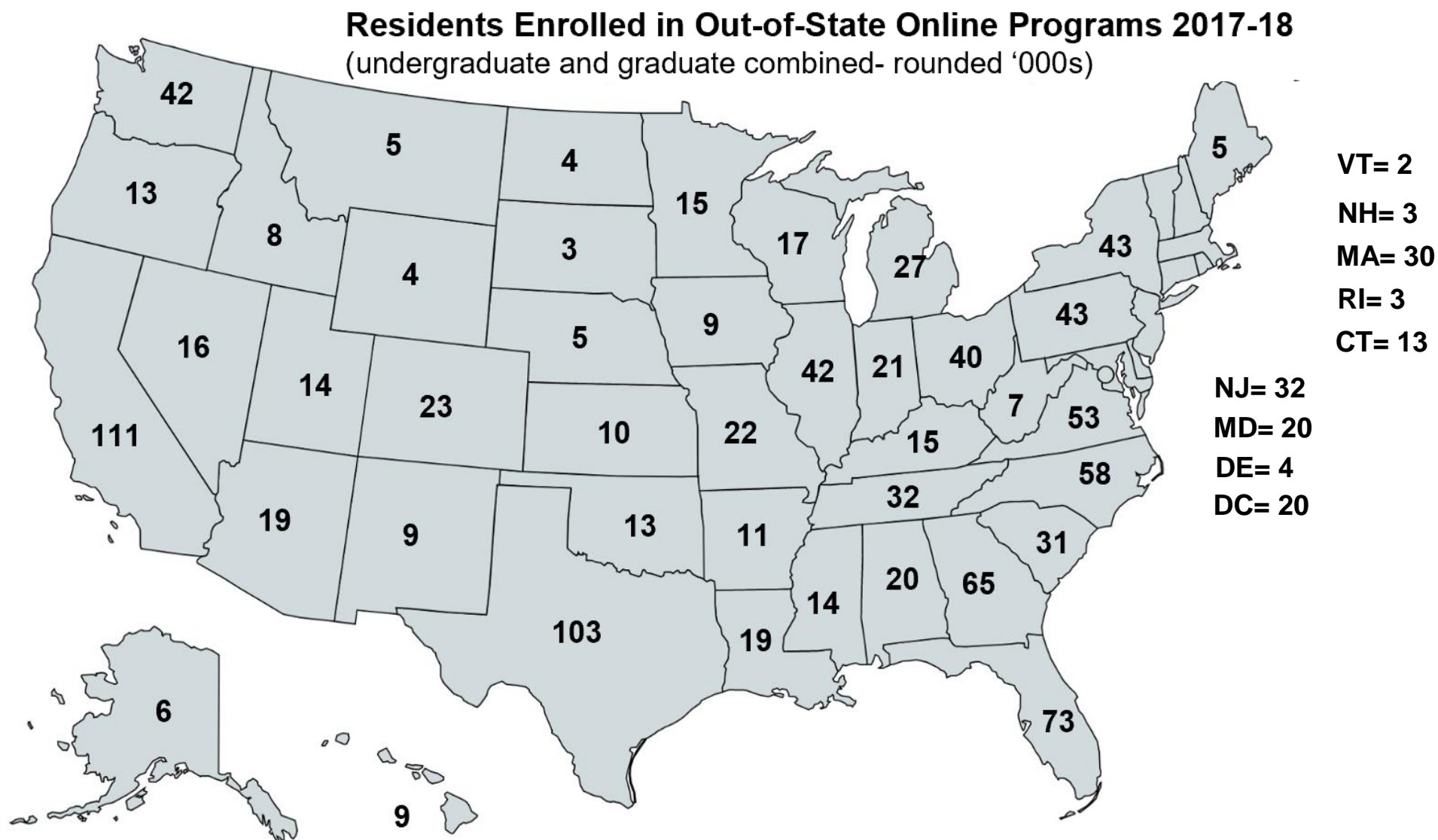


## Hidden Online Scale.

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

**51%**

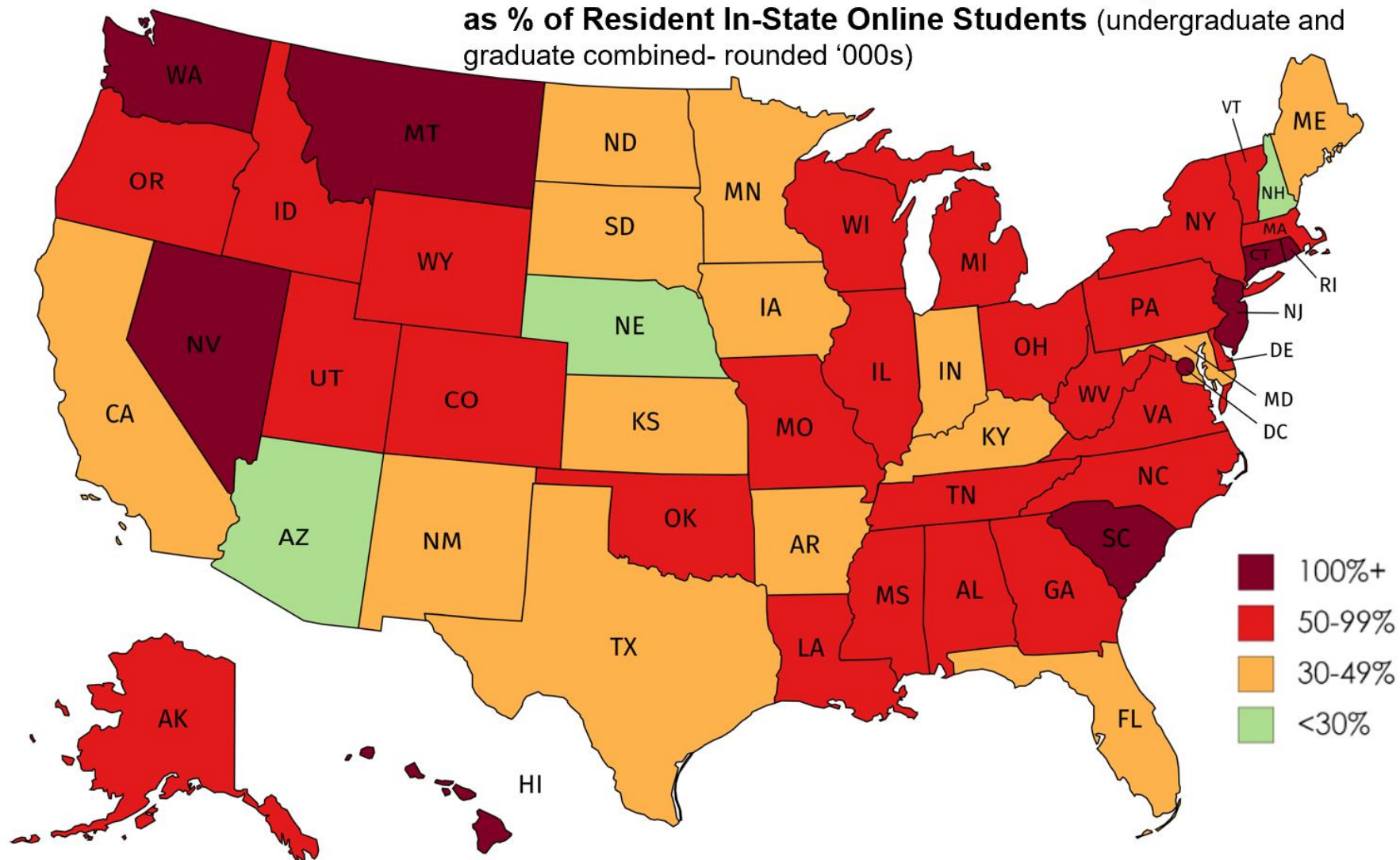
# Borderless higher education





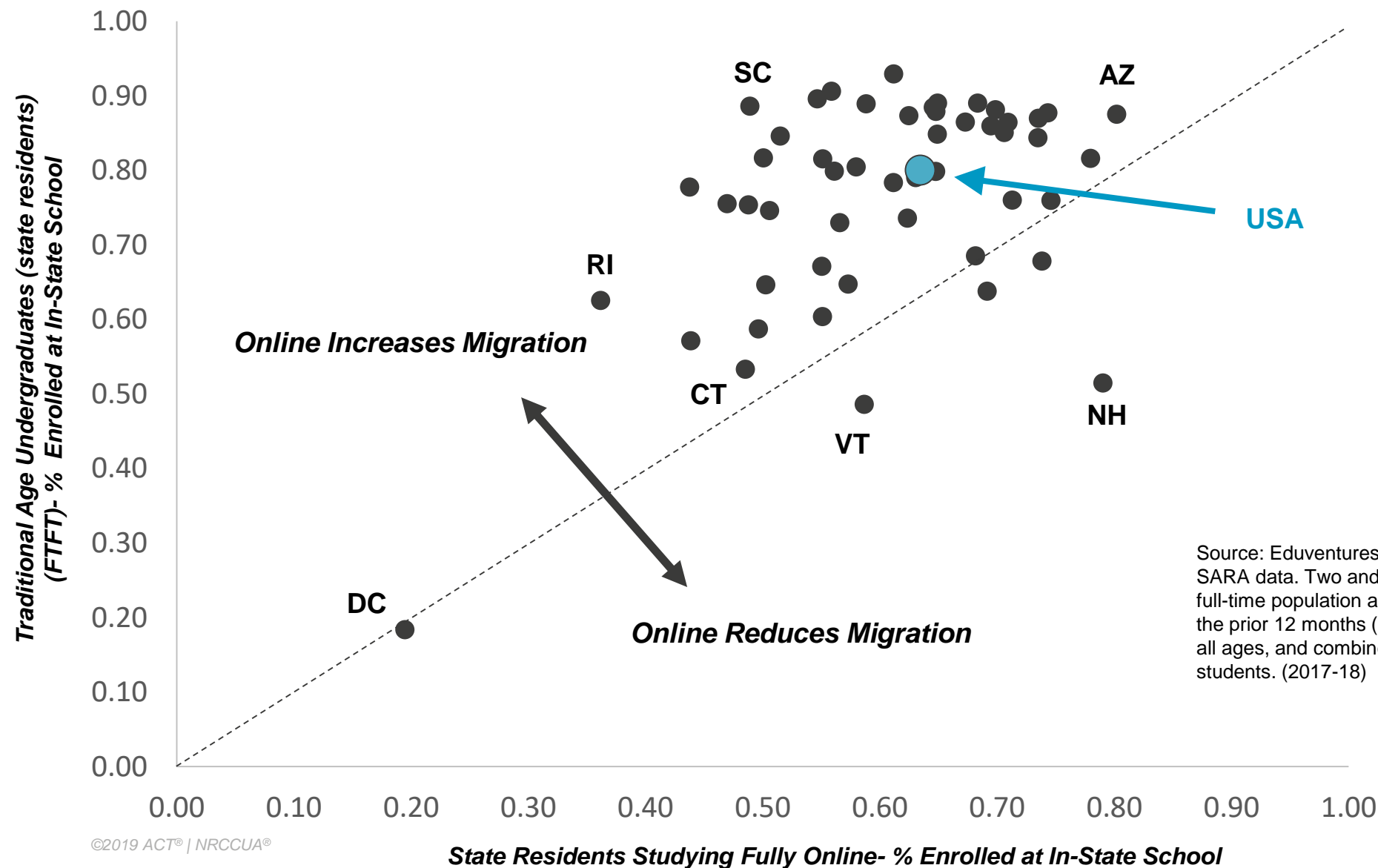
# Winners and Losers Online- how to tell?

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

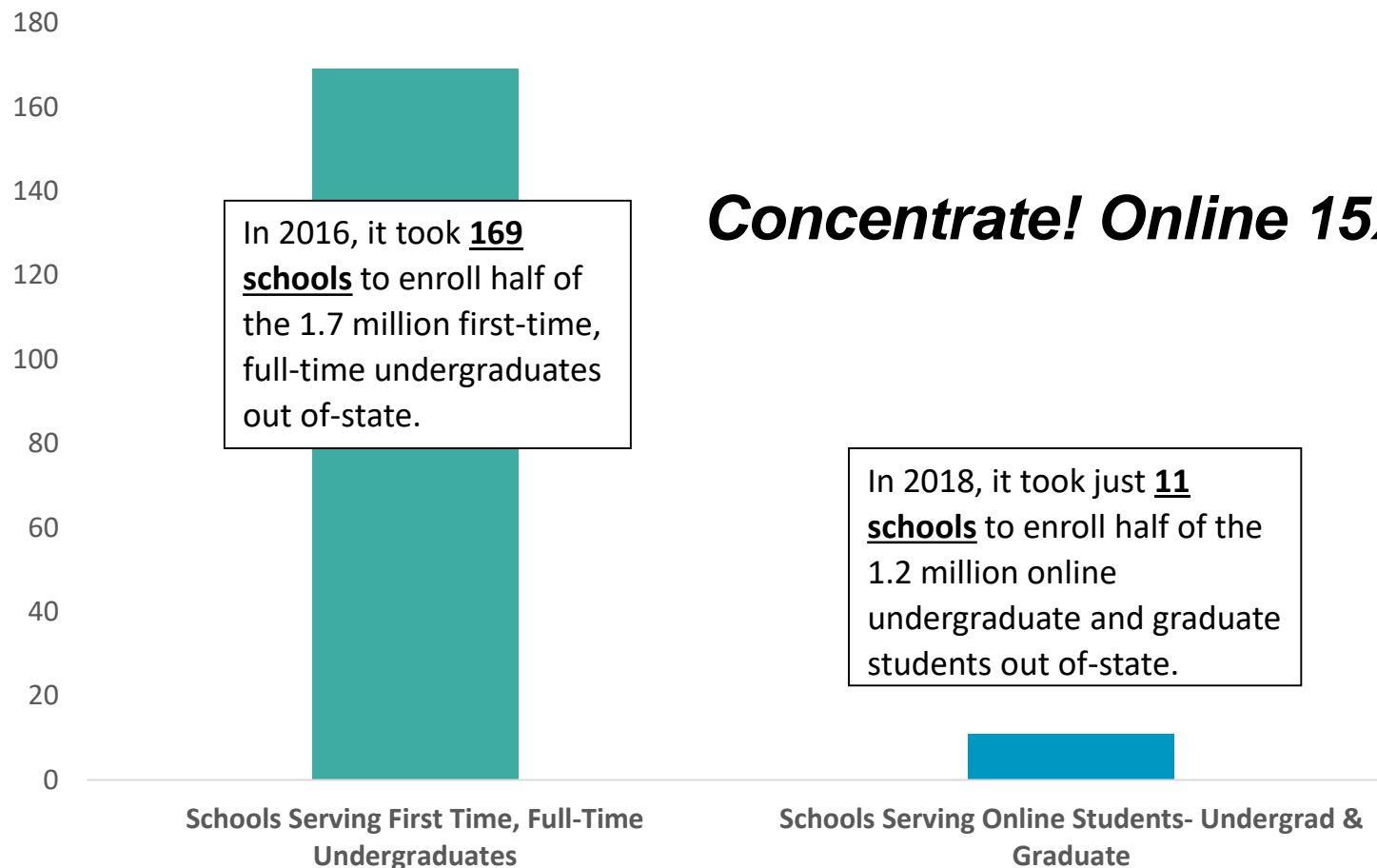




# Online broadens horizons for your state residents



# How many schools does it take to enroll half of the out-of-state students in the U.S.?

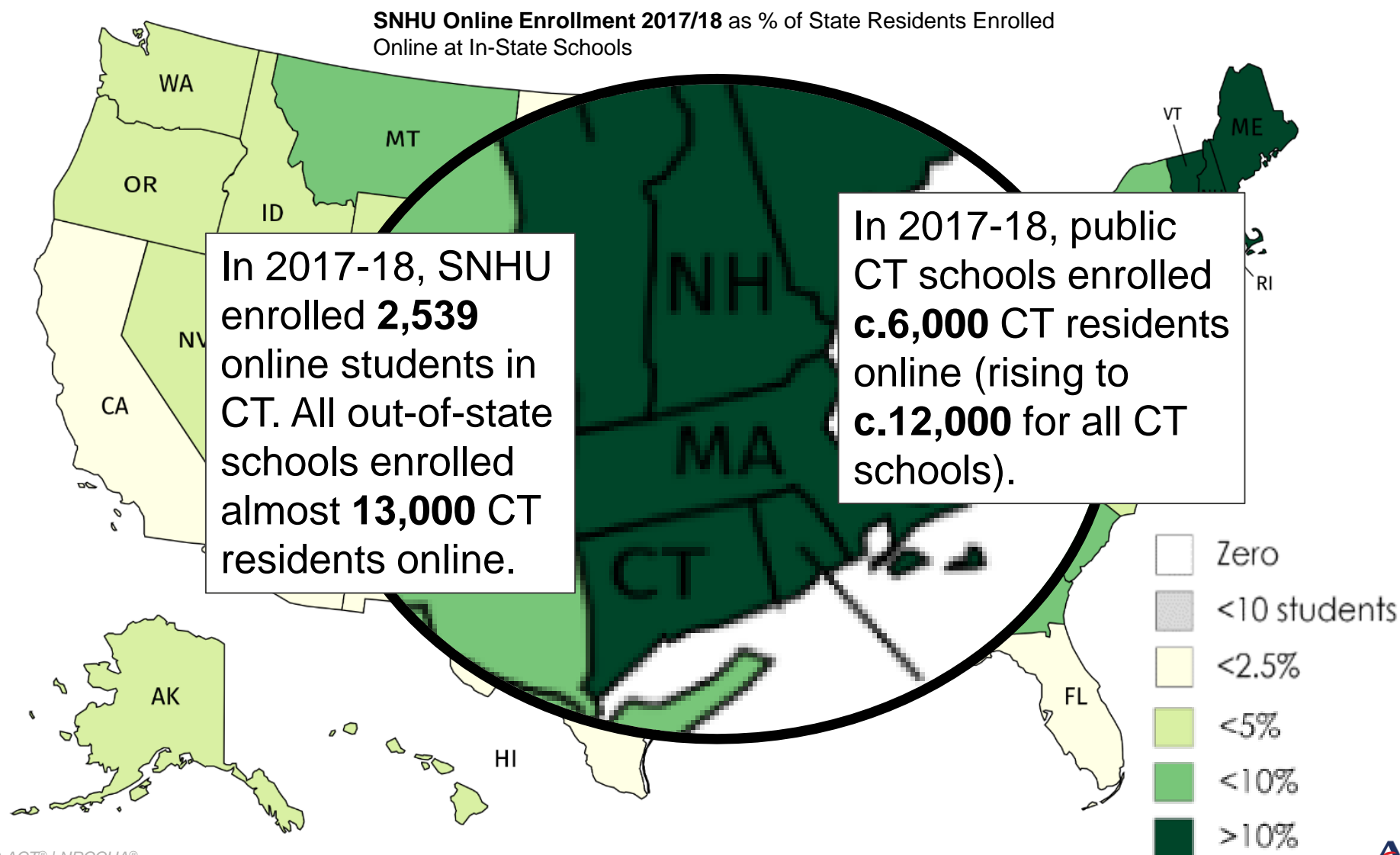


***Concentrate! Online 15x more concentrated***

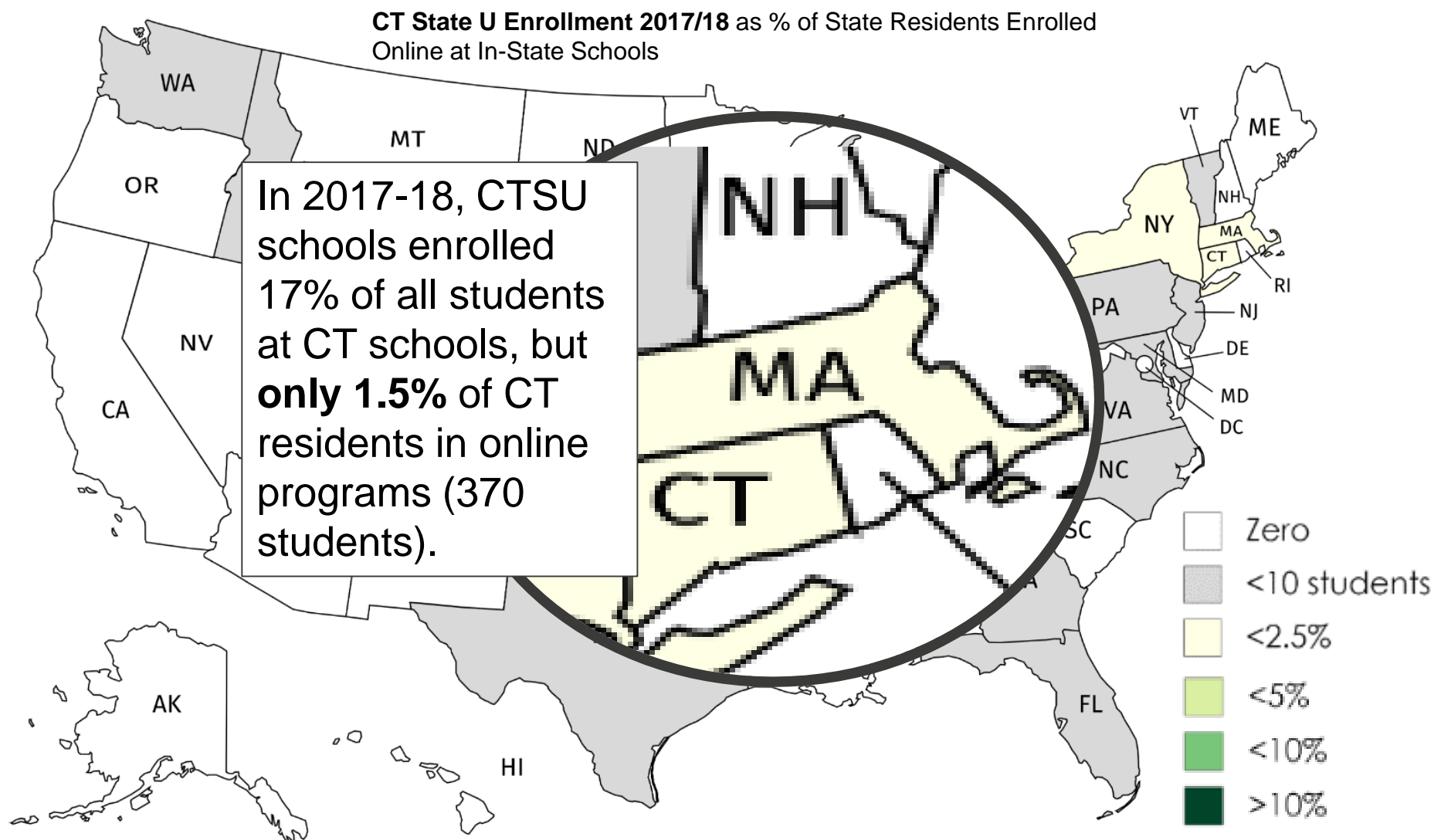


# The Battle for Connecticut.

# Understanding SNHU's Online Market



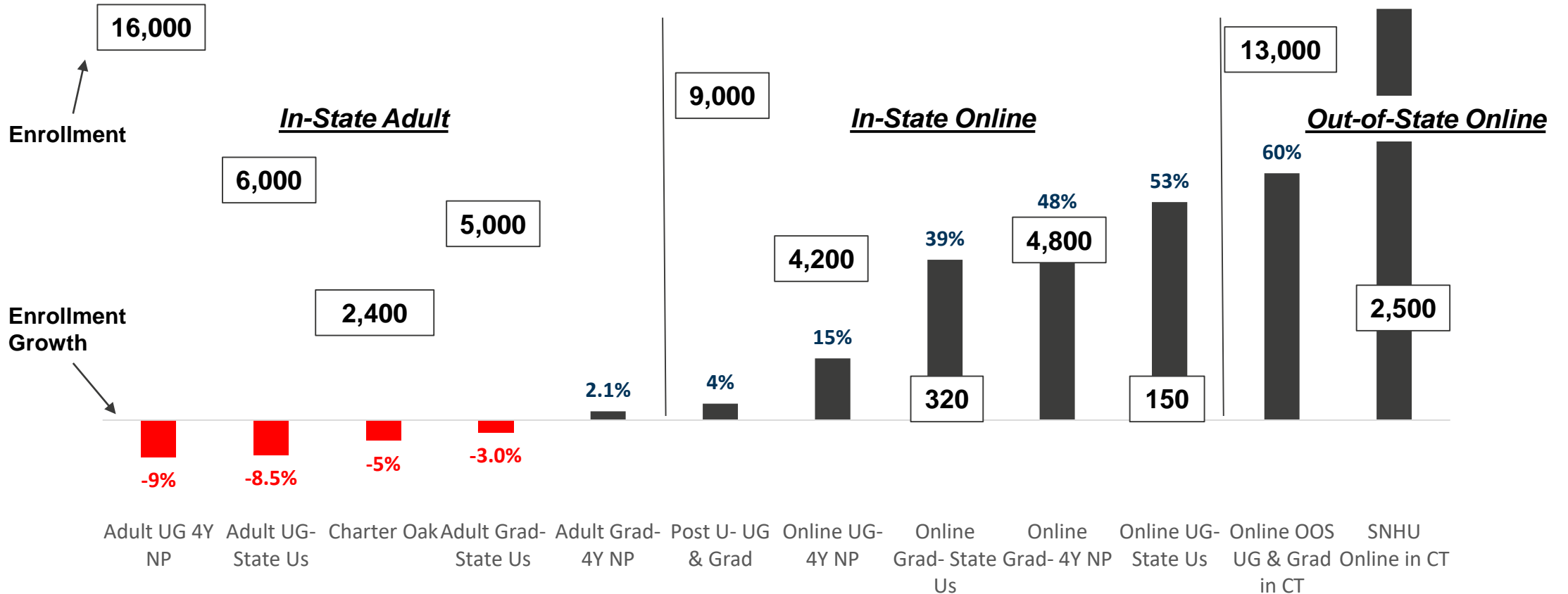
# Understanding Connecticut State U's Online Market



# What's going on in Connecticut?

25,000

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



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



## The Online Imperative for Connecticut?

### 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

**3<sup>rd</sup> most  
unequal**

CT is the 3<sup>rd</sup> most  
unequal state in the U.S.

Source: U.S. census, WICHE, Economic Policy Institute.



Connecticut has a plan...  
do you?

# Connecticut has a plan: *Students First*

CSCU **Students First**

## Connecticut has a plan: *Students First*

The logo consists of a blue rectangular box. Inside the box, the text "CSCU" is enclosed in a white square border, followed by the words "Students First" in a white sans-serif font.

### **Administrative Consolidation - System Wide**

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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*

CSCU **Students First**

## Organizational Consolidation - Community Colleges

Objective: One centrally managed college with campuses statewide

Connecticut has a plan: *Students First*

CSCU **Students First**

# Student Success Centers AND GUIDED PATHWAYS



Student Success Center  
NETWORK



## 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?

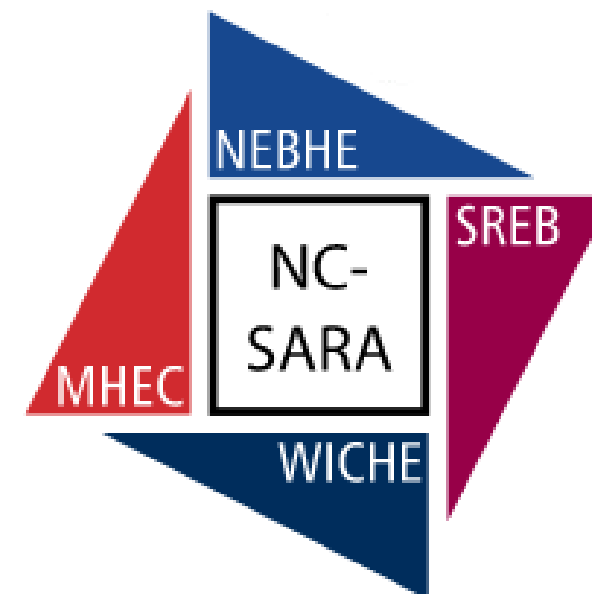


# What are the two most common state online learning policies?



## 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!



# Q&A



# The Battle for Value: Local vs. National Online Markets

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