



Employability – A National Imperative



ACADEMIC
PARTNERSHIPS™

A stylized, light gray graphic of a leafy branch, resembling an olive branch, positioned vertically on the left side of the slide. It consists of several elongated, pointed leaves arranged in a cluster.

David Daniels
President,
Academic Partnerships

Robert Lytle
Managing Director, Global
Head of Education
Parthenon - EY

Digital disruption is broad and accelerating

➤ World's largest taxi company owns no taxis



➤ Largest accommodation provider owns no real estate



➤ Largest phone companies own no telco infrastructure



➤ World's most valuable retailer has no inventory



➤ Most popular media owner creates no content



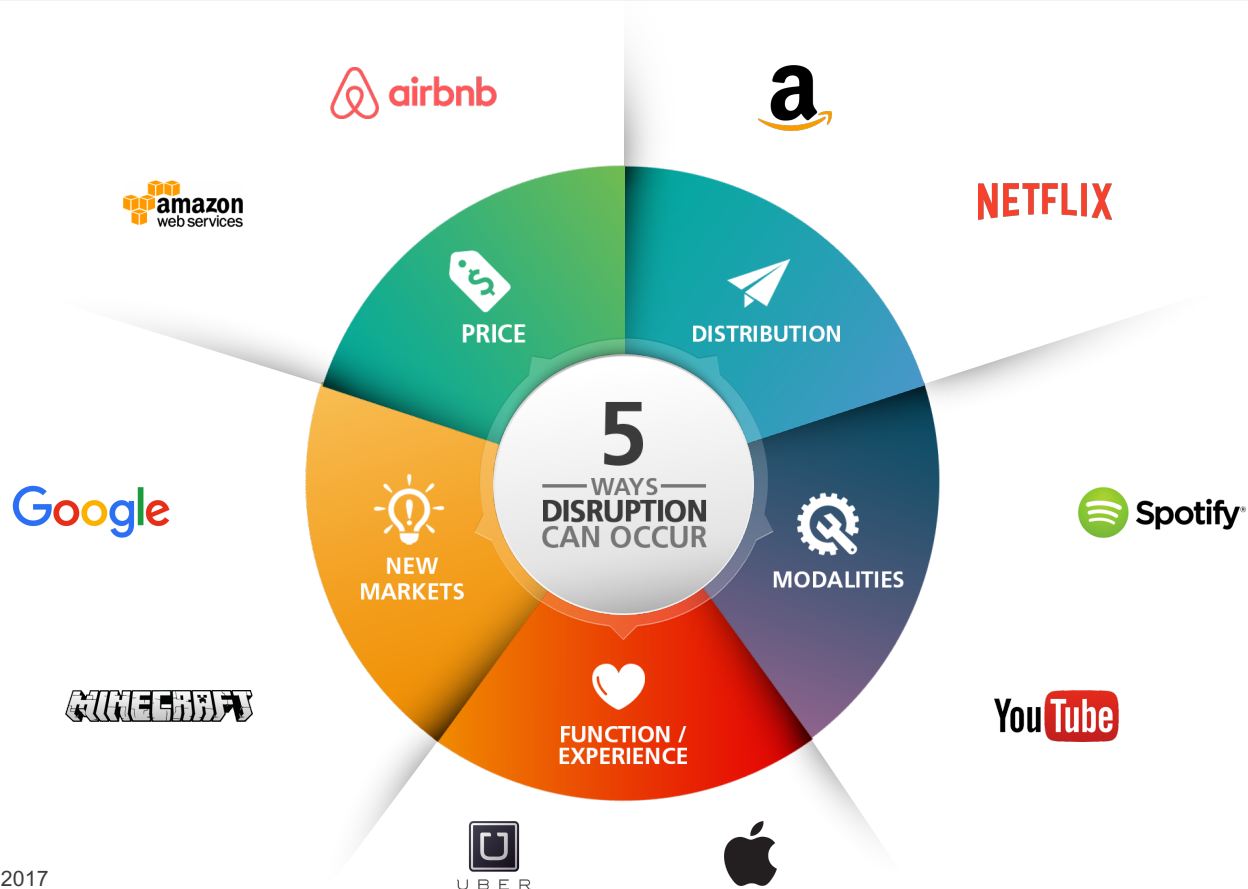
➤ World's largest movie house owns no cinemas



➤ Largest travel agency has no branches



Five Ways Disruption Can Occur



Macro Trends



POWERFUL SECULAR DRIVERS

Reduced Public Funding and
Endowment Returns

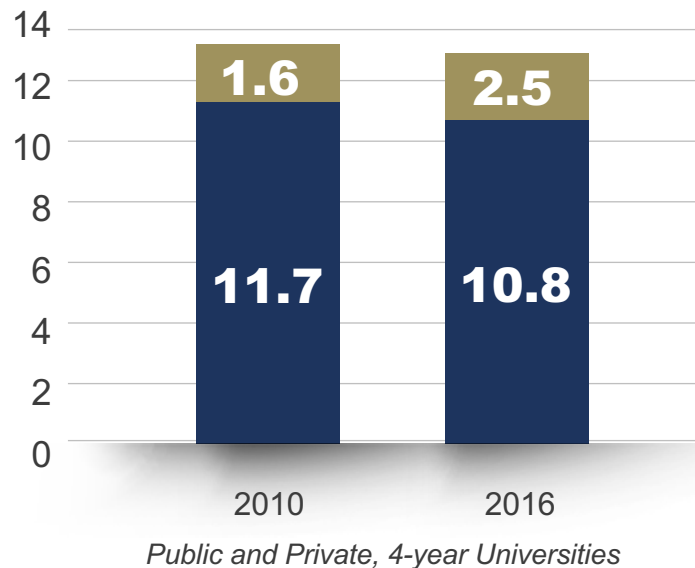
Total Enrollment in Higher Education
Continues to Decline

Resistance to Increasing Tuition

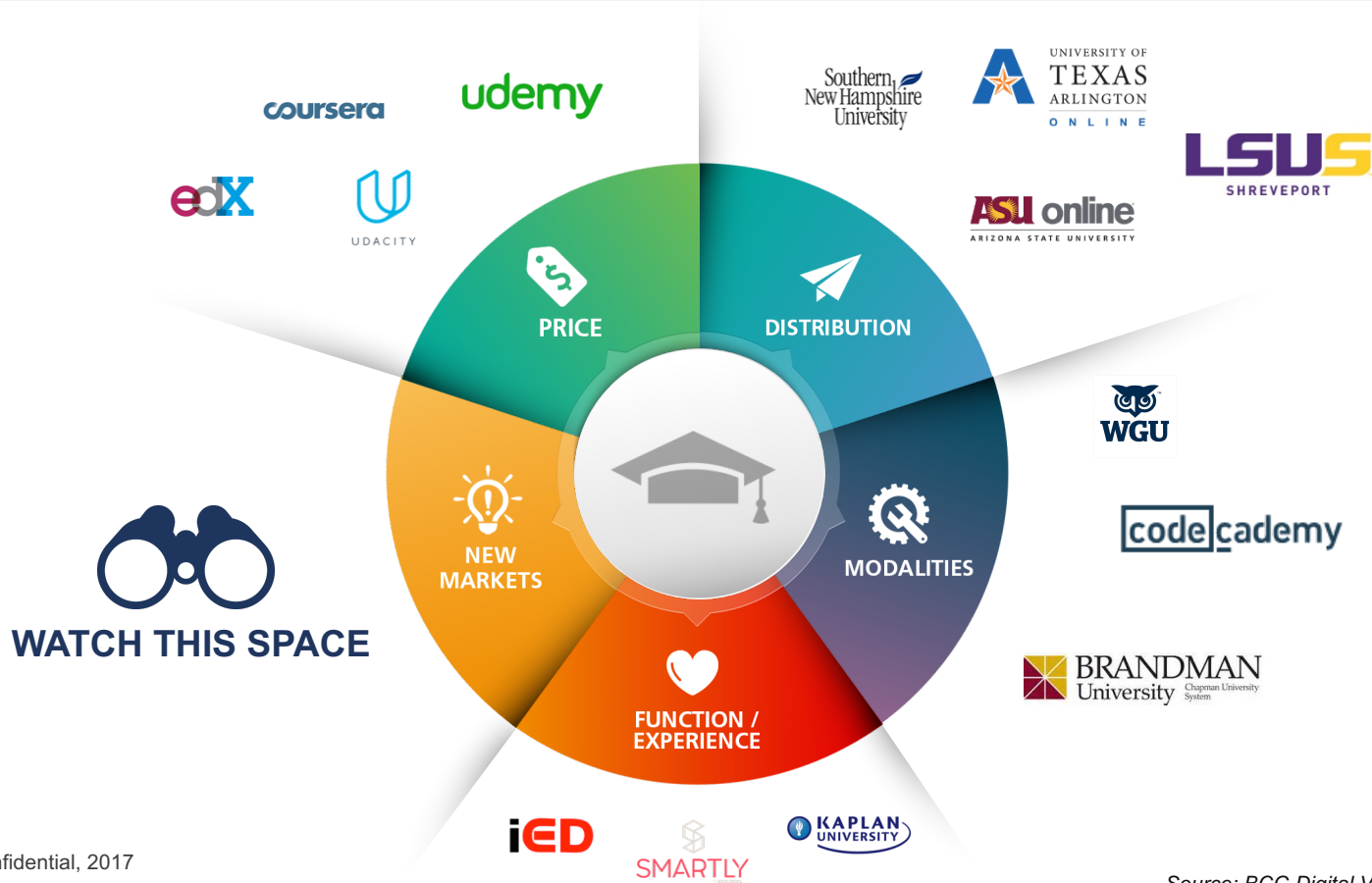
Full Acceptance of Online Learning
by Students and Employers

Growth of Post-Traditional Learners

■ **Online Student Growth 56%**
■ **On Campus Enrollment Declined -8%**



Disruption's implications for Higher Education



Today's Online Students

HIGH SCHOOL GRADUATES

WORKING ADULTS

6.3M

K12 Teachers and
Administrators

3.3M

Registered Nurses

24M

Business, Finance,
and Operations
Managers

26.1M

Employed in other
Professional
Occupations

3.4M

60M

31M

COLLEGE DROPOUTS

Who are today's online students?



Working adults looking to advance their career

- **71%** of online graduate students are employed full time
- Nearly **80%** of online students cite a career-focused reason as their primary motivator for enrolling in their program



Building on Previous Education

- Have some college already
- Are familiar with online classes



Supporting Families

- Half have kids at home
- Skew female, ages 25-49

The future...

Work is being reshaped by automation, the gig economy and innovation...

“The gig economy is growing; by 2020, EY predicts that a third of workers at ~33% of large employers will be contingent (‘gig’) workers” – EY

“47% of all jobs could be automated in the next 20 years” – Oxford Martin

“65% of the children entering grade school this year will end up working in careers that haven’t even been invented” – Duke University

...and higher education will become even more critical as economic growth is driven by industries that rely on intellectual capital.

“Compared to 57% of the manufacturing jobs lost in the recession, only 12% of manufacturing jobs created after the recession required a high school degree or less” – Georgetown Center on Education and the Workforce

“99% of the 11.6m jobs created between the recession and 2016 required more than a high school education” – Georgetown Center on Education and the Workforce

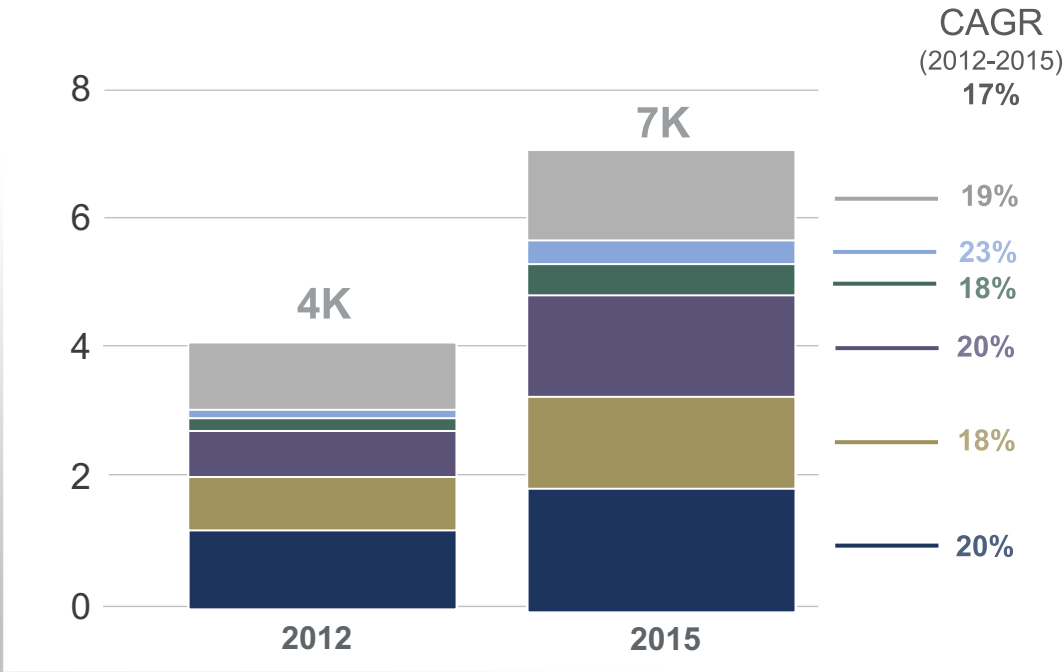
Alternative Credentialing

Institutions and other providers are offering alternative credentials to better address students' evolving educational needs



Growth Addresses Student Needs

The availability of online programs has increased dramatically to better address student's need for flexibility



Number of Distance Master's and PhD Programs by CIP Code,
All degree-granting institutions
2012-2015



OTHER



THEOLOGY



COMPUTER AND
INFORMATION SCIENCE



HEALTH PROFESSIONS



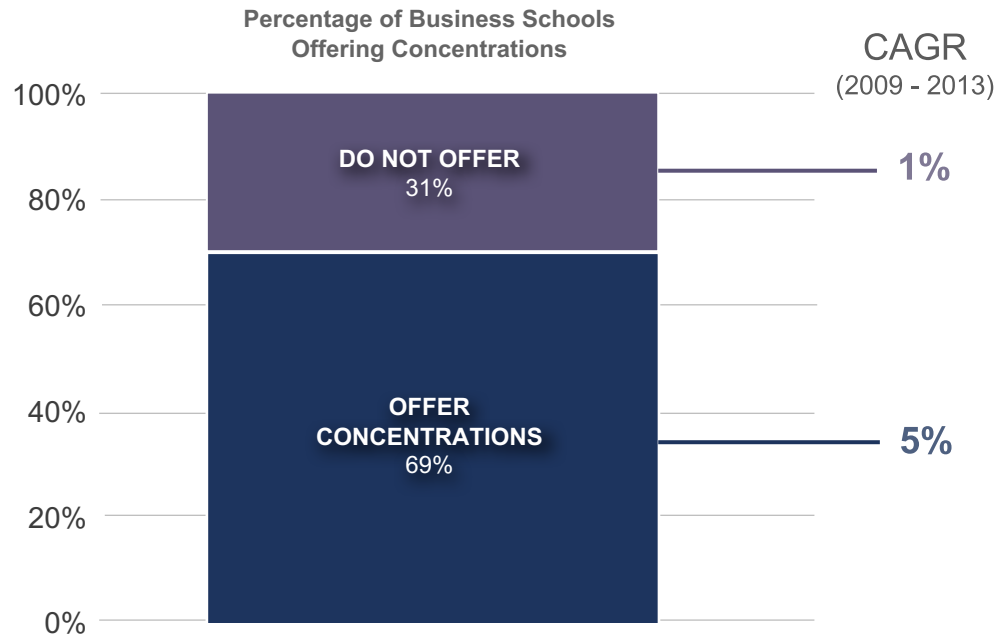
BUSINESS, MANAGEMENT,
MARKETING



EDUCATION

Business Schools Offering Concentrations

About 70% of schools offer degree concentrations (e.g., focus on Global Finance), which have been an important differentiator for fast-growing schools



TYPICAL CONCENTRATIONS:

- Global Marketing
- Global Finance
- Business Analytics
- Global Entrepreneurship
- Global Supply Chain Management
- Global Sustainability

Online student motivations



ON-CAMPUS STUDENT



ONLINE STUDENT



PRICE

Not as price-sensitive if they receive financial aid

Affordability is most important



PROGRAM DURATION

Semester-based calendar is standard

Accelerated time to complete



ADMISSION REQUIREMENTS

Accepted as standard

Work experience matters



SPEED OF ADMISSION

Willing to wait

Expect rapid response



ACCESSIBILITY

2-3 semester starts a year

6-8 starts a year



BRAND

Prestige and campus life experience is important

Career relevance more important than brand

Unlocking the potential of the online student



PRICE

High-quality program,
competitively priced
tuition



ADMISSION REQUIREMENTS

Honor work experience



PROGRAM DURATION

Asynchronous,
accelerated courses



ACCESSIBILITY

A minimum of 6 starts
per year, 100% online,
no on-site requirements



BRAND

Career-relevant portfolio
of programs with
multiple concentrations



SPEED OF ADMISSION

Rapid feedback in
admissions process

Most Popular and Fastest Growing Programs



EDUCATION

- M Ed
- C&I
- Ed Leadership
- Special Ed
- School Counseling
- Masters in Clinical Mental Health Counseling

EdD or EdS

- Administration
- C&I



HEALTHCARE

- BSN
- RN-BSN
- RN-MSN
- MSN-Educator
- MSN-Administrator
- MSN-FNP
- DNP

Other

- Masters in Social Work



BUSINESS

- General MBA
General MBA + 4 choices of these popular specialties
- MBA - Accounting
- MBA - Healthcare Admin.
- MBA - Finance
- MBA - Human Resources
- MBA – Marketing

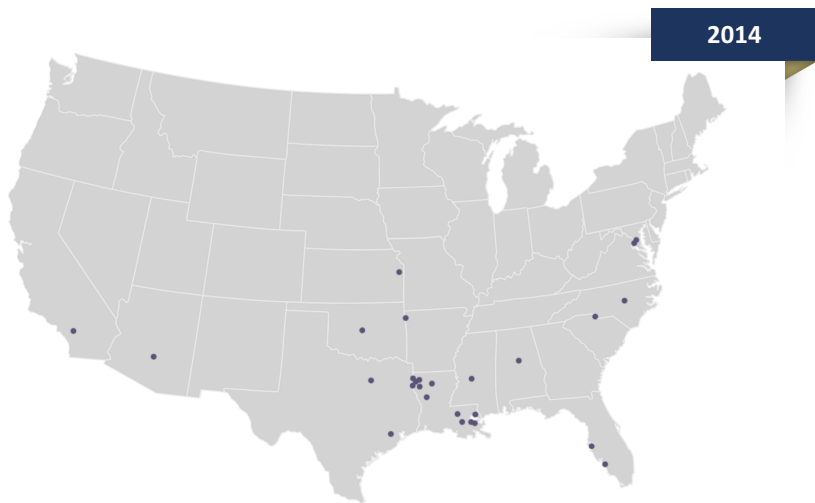


DEGREE COMPLETION

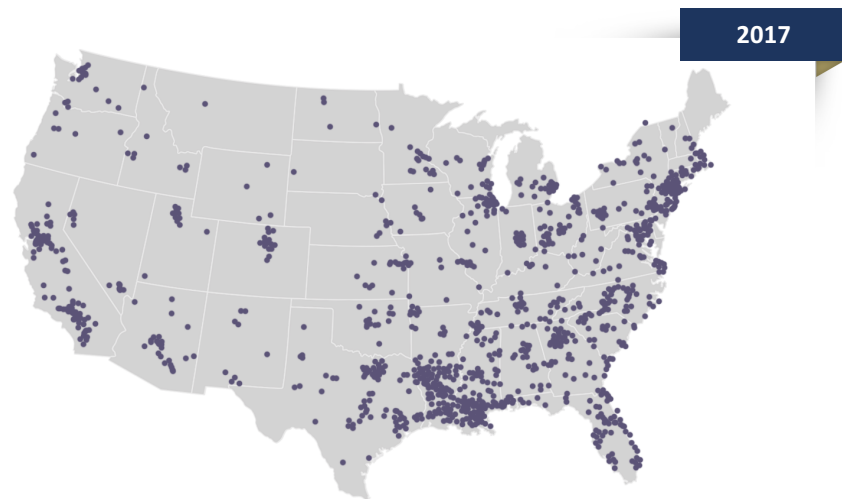
- BBA – General
General BBA + 3 choices of these popular specialties
- BBA - Accounting
- BBA - Finance
- BBA - Marketing
- Psychology
- Interdisciplinary/General Studies
- Communications

MBA Program – *(From 56 Students on Campus to 1,794 Students Online)*

In the first year after launch of the online MBA program, it had **429 students** enrolled in the online program.



After the first **44 months**, the university had more than **1,794 students** enrolled in the program.



In 2017, this partner enrolled **53% of MBA students** attending Louisiana public universities.

Student Success

“

"I really have nothing but accolades for this online program. The coursework was so purposeful that every single course immediately applied back to my classroom."

– Jane Hudspeth, online M.Ed. in Educational Leadership graduate, UWF

“

"The thought of returning to school to acquire new skills is daunting. I had been out of school for 35 years. I say you can do it."

– Dwight Akerman, online MBA in Healthcare Management graduate, UT Tyler

“

"I've been able to apply the information from the MBA program to my job a lot more than I thought I would. I wish I had done this sooner."

– Andy Johnson, online MBA in Entrepreneurship student, UWF

“

"Because of its affordability, my degree is paid in full. I'm better prepared to save for retirement and other important investments that my counterparts are probably not even thinking about. I thought the value and overall experience were excellent"

– Matt Belanger, online MBA graduate, Fitchburg State University