I. SCHEDULE OF EVENTS

II. CHAIRMAN'S WELCOME & REMARKS - Chair Morone

III. NONPUBLIC SESSION

MOVED, that the Board of Trustees go into nonpublic session for the purposes of (1) discussing personnel matters including the performance of one or more public employees, (2) confidential, commercial, or financial information, (3) matters of market strategy which, if discussed in public, would likely benefit a party or parties whose interests are contrary to those of the general public, (4) matters likely to affect collective bargaining strategy, and (5) consultation with legal counsel as authorized by RSA 91-A:2, I (a) and (b); 91-A:3, II (a), (b), and (d); and 91-A:5, IV.

IV. ADJOURN
Committee & Business Meetings
UNH Franklin Pierce School of Law
Concord, NH
January 16-17, 2020

Parking –

Overnight Accommodations:
The Hotel Concord
11 S. Main Street
Concord, NH 03301

WiFi – UNH Public

Schedule of Events

Thursday, January 16th –

7:30 am -   Continental Breakfast
8:00 am – 9:30 am  Board of Trustees – Nonpublic Session - Room 274
9:30 am – 11:30 am Educational Excellence Committee – Room 274
   (All Trustees encouraged to attend)
11:30 am – 1:00 pm  Working Lunch for Committees
11:30 am – 1:00 pm  Governance Committee – Tenney Boardroom
11:30 am – 1:00 pm  Audit Committee – Room 274
11:30 am – 1:00 pm  Investments Committee – Room 283 (Jorda Conf Room)
1:00 pm – 4:00 pm  Financial Affairs Committee – Room 274
   (All Trustees encouraged to attend)
4:00 pm – 6:00 pm  Board of Trustees – Nonpublic Session – Room 274
6:00 pm – 6:30 pm  Executive Committee – Executive Nonpublic Session – Room 274
6:30 pm – 7:15 pm  Reception – Trustees & Invited Guests – The Jury Box
   (students/presenters)
7:15 pm -   Dinner – Trustees & Invited Guests – The Jury Box
   (students/presenters)

Friday, January 17th –

8:00 am -   Continental Breakfast
8:30 am – 12:00 pm  Board of Trustees Meeting – Room 274
12:00 pm – 1:00 pm  Boxed lunches
12:00 pm – 12:30 pm  Nomination Committee – Room 283 (Jorda Conf Room)
USNH Board of Trustees - Parking Pass

For use in Parking Lot 2 or handicap parking (with appropriate tags).
Please place this in your windshield on day of event.

January 16-17, 2020

UNH Law Parking Map

Street parking available on White St and Washington St without permit

- Entrance

White Park
CALL TO ORDER - Chair Morone

NONPUBLIC SESSION

MOVED, that the Board of Trustees go into nonpublic session for the purposes of (1) discussing personnel matters including the performance of one or more public employees, (2) confidential, commercial, or financial information, (3) matters of market strategy which, if discussed in public, would likely benefit a party or parties whose interests are contrary to those of the general public, (4) matters likely to affect collective bargaining strategy, and (5) consultation with legal counsel as authorized by RSA 91-A:2, I (a) and (b); 91-A:3, II (a), (b), and (d); and 91-A:5, IV.

EXECUTIVE NONPUBLIC SESSION

MOVED, that the Executive Committee go into executive nonpublic session as authorized by USNH Board Bylaws, Article V, Section 4g.

ADJOURN
I. CHAIR’S WELCOME & REMARKS - Chair Morone

II. CONSENT AGENDA

MOVED, that the consent agenda for January 17, 2020 be approved.

A. Board Minutes

MOVED, that the Board of Trustees approve the minutes of the meetings held on October 28-29, 2019 as presented.

III. PRESIDENTS REPORTS

IV. COMMITTEE REPORTS

A. Executive Committee - Chair Morone

B. Educational Excellence Committee - Trustee Eastwood

1. Faculty Appointment with Tenure Recommendation

MOVED, on recommendation of President Dean and the Educational Excellence Committee, that the Board of Trustees approve the appointment of one professor with tenure at the University of New Hampshire, as presented in the supporting material.

C. Governance Committee - Trustee Ardinger

1. Motion to Amend Board Policy regarding Implementation of the Student Trustee Election Law (BOT I.A)

MOVED, on recommendation of the Governance Committee, the Board of Trustees hereby adopts the amendment to the Board’s policy on Implementation of the Student Trustee Election Law (BOT I.A), as set forth in the attached materials.

D. Audit Committee - Trustee Walker

E. Investments Committee - Trustee Rutman

F. Financial Affairs Committee - Trustee Black

1. Approve proposed maximum FY21 mandatory fees and room & board

MOVED, on recommendation of the Financial Affairs Committee that, effective for fall semester 2020 (FY21), mandatory student fees be adopted in amounts not to exceed $3,418 at UNH-Durham; $2,884 at KSC; and $2,622 at PSU; AND FURTHER, that maximum housing and dining rates be adopted as the maximum per the attached schedules.

2. Approve tuition rates for FY21

MOVED, on recommendation of the Financial Affairs Committee that, effective for academic year 2020-21, the tuition rates as presented on the attached schedule be adopted as the maximum amounts authorized.

3. Approve $3.34 million in FY20 strategic investments at UNH

MOVED, on recommendation of the Financial Affairs Committee, that the University of New Hampshire be authorized to spend an additional $3.34 million over the previously approved FY20 budget for specific strategic purposes.

V. DISCUSSION ITEMS
A. Online and Graduate Programs & Markets - Chancellor Leach

1. Pre-Read Materials
   a. 2019 IPEDS 5 Insights
   b. Meet the English Professor
   c. Online College Students Comprehensive Data

B. CAMPUS STRATEGIC PLAN - President Dean

VI. NONPUBLIC SESSION

MOVED, that the Board of Trustees go into nonpublic session for the purposes of (1) discussing personnel matters including the performance of one or more public employees, (2) confidential, commercial, or financial information, (3) matters of market strategy which, if discussed in public, would likely benefit a party or parties whose interests are contrary to those of the general public, (4) matters likely to affect collective bargaining strategy, and (5) consultation with legal counsel as authorized by RSA 91-A:2, I (a) and (b); 91-A:3, II (a), (b), and (d); and 91-A:5, IV.

VII. EXECUTIVE NONPUBLIC SESSION

MOVED, that the Executive Committee go into executive nonpublic session as authorized by USNH Board Bylaws, Article V, Section 4g.

VIII. WRAP-UP AND NEXT STEPS

IX. ADJOURN
October 24, 2019 – Morning Session

In Attendance: Trustees: Chair Joseph Morone, Vice Chair Jamie Burnett, Secretary Kassandra Ardinger, Amy Begg, Don Birx, Jim Dean, Jackie Eastwood, Frank Edelblut, George Hansel, Rhonda Hensley (on behalf of Governor Sununu), Todd Leach, Scott Mason, Chris Pope, Mark Rubinstein, Marjorie Smith, Melinda Treadwell, and David Westover.

University System Student Board (USSB) members: Victoria Bergstrom, Aura Huot, Aaron Keaton, and Tyler Minnich.

Call to Order: At 8:00 am, Chair Morone called the morning session to order and noted the presence of a quorum sufficient for the conduct of business.

Discussion: Chair Morone distributed a draft document entitled “USNH Board Retreat, 9/20/2019 – Points of Consensus” (copy attached) and invited discussion. General agreement with the document emerged from the discussion with one modification. While there was agreement that UNH collaboration will be essential for any system-wide synergy project to be successful, the prevailing sentiment acknowledged UNH did not necessarily have to be in the lead.

Chair Morone briefly reviewed the agenda, expectations, and desired outcomes for the Board’s meetings over the next day and half. Chair Morone acknowledged the changes from the Board’s past practice and committed to assessing those changes and making further adjustments as may be desirable.

Adjournment: At 9:20 am, Chair Morone adjourned the Board of Trustees until the afternoon session, scheduled to begin at 4 pm. The Board’s committees are scheduled to meet in the interim.

October 24, 2019 – Afternoon Session

In Attendance: Trustees: Chair Joseph Morone, Vice Chair Jamie Burnett, Secretary Kassandra Ardinger, Amy Begg, Jackie Eastwood, Frank Edelblut, Suzanne Foster, Cailee Griffin, George Hansel, Rhonda Hensley (on behalf of Governor Sununu), Shawn Jasper, Scott Mason, Chris Pope, Joe Scala, Marjorie Smith, Melinda Treadwell, Alex Walker, and David Westover.
**Call to Order:** At 4:30 pm, Chair Morone called the afternoon session to order and noted the presence of a quorum sufficient for the conduct of business.

**Discussion:** Chair Morone described the agenda for the afternoon session including a discussion with President Treadwell on the human resources available to her for achieving her institution’s annual goals, meeting the attendant challenges, and executing the strategic plan. Chair Morone then called for a motion to go into non-public session.

**Non-public Session:** On motion moved by Trustee Pope and seconded by Trustee Mason, the Board voted by unanimous roll call to go into non-public session:

> VOTED, that the Board of Trustees go into nonpublic session for the purposes of (1) discussing personnel matters including the performance of one or more public employees, (2) confidential, commercial, or financial information, (3) matters of market strategy which, if discussed in public, would likely benefit a party or parties whose interests are contrary to those of the general public, (4) matters likely to affect collective bargaining strategy, and (5) consultation with legal counsel as authorized by RSA 91-A:2, I (a) and (b); 91-A:3, II (a), (b), and (d); and 91-A:5, IV.

At 5:40 pm, President Treadwell was excused, and the Board continued its discussion in non-public session.

**Return to Public Session:** At 5:55 pm, on motion duly moved and seconded, the Board voted to return to public session. Chair Morone announced the Board took no votes and made no decisions during the non-public session.

**Adjournment:** At 6:00 pm, Chair Morone adjourned the Board of Trustees for the evening and reminded members of the Board’s business meeting, scheduled to begin the following morning at 8:30 am, October 25, 2019.

**October 25, 2019 – Board Business Meeting**

**In Attendance:** Trustees: Chair Joseph Morone, Vice Chair Jamie Burnett, Secretary Kassandra Ardinger, Amy Begg, Don Birx, Jim Dean, Jackie Eastwood, Frank Edelblut, Suzanne Foster, Cailee Griffin, George Hansel, Shawn Jasper, Todd Leach, Scott Mason, Mike Pilot, Chris Pope, Mark Rubinstein, Joe Scala, Marjorie Smith, Melinda Treadwell, Alex Walker, and David Westover.

University System Student Board (USSB) members: Victoria Bergstrom, Aura Huot, Aaron Keaton, Tyler Minnich, and Leo Shattuck.

**Call to Order:** At 8:30 am, Chair Morone called the Board’s business meeting to order and noted the presence of a quorum sufficient for the conduct of business. Chair Morone briefly reviewed the agenda and desired outcomes for the business meeting, which is scheduled to end at or about Noon.

**Consent Agenda:** On motion moved by Trustee Foster and seconded by Trustee Eastwood, the Board voted unanimously to approve the consent agenda, comprised of the following three action items:
Board Minutes:

VOTED, that the Board of Trustees approve the minutes of the meets held on June 28, 2019 and September 20, 2019.

Suspend Enrollment Limitation of Out-of-State Undergraduates at UNH:

VOTED, on recommendation of the Financial Affairs Committee that the Board of Trustees suspend for FY21 the limitation of 25 percent imposed by state statute RSA 187-A:10 on the number of undergraduate students enrolled at UNH from domiciles outside the state, it having been determined that such suspension benefits the state and UNH without impairing the opportunity for qualified students of the state of New Hampshire to attend UNH.

Accept and Forward Financial Statements for the Fiscal Year Ended June 30, 2019:

VOTED, on recommendation of the Audit Committee, that the USNH Financial Statements for the fiscal year ended June 30, 2019 be accepted and forwarded to the Governor, the Legislative Fiscal Committee, and others as specified in state law RSA 187-A:22. All attachments can be found in the Audit Committee materials.

Committee Reports: Chair Morone noted the minutes from each of yesterday’s committee meetings were distributed in hardcopy prior to start of this meeting. He then invited the committee chairs to report briefly on the work accomplished. The one action item recommended by a committee for the Board’s consideration came from the Financial Affairs Committee. On motion moved by Trustee Pope and seconded by Trustees Edelblut and Pilot, the Board voted unanimously to freeze in-state tuition rates for fiscal year 2021.

Approval in-state tuition rate freeze for FY21:

VOTED, on recommendation of the Financial Affairs Committee, in recognition of the strong support from both the Executive and Legislative branches of NH State government as reflected in its biennial operating budget for the USNH institutions, to make tuition more affordable for New Hampshire students, that, for FY21, undergraduate in-state tuition rates frozen at FY20 levels be adopted as the maximum amounts authorized, based on the funding levels for FY21 in the adopted State operating budget.

Non-traditional Student Market Analysis: Chancellor Leach delivered a presentation on and led the Board in discussion of the non-traditional student market. At the conclusion of the Board’s discussion, Chair Morone asked the Educational Excellence Committee to continue reviewing the related issues and opportunities and report back to the Board with the committee’s findings and recommendations.

Keene State College Strategic Plan: President Treadwell delivered a presentation on and led the Board in discussion of KSC’s current three-year strategic plan, including KSC’s current status and the remaining challenges and opportunities. Entitled the “KSC Sustainability and Viability Plan, 2018-2021,” the plan contains three goals and eight priorities. President Treadwell will lead the college in the next round of strategic planning beginning in the coming summer of 2020.
Non-public Session: On motion moved by Trustee Pope and seconded by Trustee Mason, the Board voted by unanimous roll call to go into non-public session:

**VOTED, that the Board of Trustees go into nonpublic session for the purposes of (1) discussing personnel matters including the performance of one or more public employees, (2) confidential, commercial, or financial information, (3) matters of market strategy which, if discussed in public, would likely benefit a party or parties whose interests are contrary to those of the general public, (4) matters likely to affect collective bargaining strategy, and (5) consultation with legal counsel as authorized by RSA 91-A:2, I (a) and (b); 91-A:3, II (a), (b), and (d); and 91-A:5, IV.**

Return to Public Session: At 11:55 am, on motion duly moved and seconded, the Board voted to return to public session. Chair Morone announced the Board took one vote during the non-public session. On motion moved by Trustee Begg and seconded by Trustee Burnett, the Board voted unanimously to ratify the tentative agreement with the adjunct faculty bargaining unit at Plymouth State University.

**Motion to Recommend Ratification of the Tentative Agreement between Plymouth State University and the State Employees Association – SIU Local 1984**

**VOTED, on recommendation of the President of Plymouth State University, that the Board of Trustees hereby approve and ratify the proposed collective bargaining agreement with the State Employees Association, SIU Local 1984.” AND FURTHER, hereby authorizes the President to execute the July 1, 2019 – June 30, 2022 collective bargaining agreement on behalf of the Board of Trustees.**

Adjournment: At 12:05 pm, on motion duly moved and seconded, Chair Morone adjourned the meeting of the Board of Trustees. The next regularly scheduled Board and committee meetings will be held on January 16 and 17, 2020, at the University of New Hampshire Franklin Pierce School of Law in Concord, NH.
USNH Board Retreat, 9/20/19

Points of Consensus:

1. Support the Mission:
   a. Strengthen the Flagship: any resources freed up internally at UNH should be reinvested there for strategic purposes.
      i. Board’s role is to ensure those purposes are well defined and adequately supported.
   b. Sustain PSU and KSC: if need be, accept losses in a transition to a more sustainable configuration.
      i. Board’s role is to review, approve and monitor PSU and KSC transition plans
   c. Develop a system-wide approach to non-traditional markets, clearly defining GSC’s role within that approach
      i. Begin with market analysis at October meeting
      ii. Should be one of EE’s areas of focus this year
      iii. Goal should be to define the system-wide approach at the September 2020 retreat

2. Strive to make “the system whole greater than the sum of its parts”
   a. Minimize competition among system institutions.
      i. Board mandate: UNH should initiate coordinated application/admission process.
   b. Continue to pursue significant system synergies.
      i. Board mandate: Focus on the 1 or 2 new initiatives that UNH will lead. Ideal would be distance learning.
      ii. Continue to advance Procurement and IT initiatives, balancing centralized authority with decentralized input.
   c. Develop a robust IR (internal and external) capability within the system office.
      i. Board mandate: institutions should provide system office with data transparency

3. Revisit the system structure periodically, including at the 2020 retreat.
February 4: State of the University address to offer update on UNH strategic plan
The university community is invited to hear an update on The Future of UNH (strategic priorities), presented by President James W. Dean Jr. and UNH leaders at the State of the University address on Feb. 4. The event is open to the public, and a video of the presentation will be emailed to trustees who are unable to attend.

UNH to oversee $26.8 million preschool development grant awarded to NH
Reflecting its growing partnership with state government, UNH has been selected as the lead agency administering a $26.8 million federal grant awarded to New Hampshire to improve preschool development. The grant will support a variety of resources to help families with young children, including a Welcome Families website, New Hampshire Family Resource Centers and instruction in best practices for preschool learning. The grant also provides for the development of an Early Childhood Center of Excellence at UNH, which Gov. Chris Sununu requested in his capital budget.

President Dean visits New Hampshire high schools to meet with students, staff
President Dean traveled across New Hampshire this fall to visit regional high schools, including Fall Mountain Regional, White Mountains Regional and Spaulding. Joined by UNH students, the president talked with high school students, teachers and administrators about UNH academic programs, research and internship opportunities and options to make college more affordable. Additional visits will be held this spring.

Two faculty members named among world’s most highly cited researchers
David Finkelhor, professor of sociology, and Serita Frey, professor of natural resources, are among the Web of Science Group’s 2019 Highly Cited Researchers. The list recognizes the most influential researchers of the past decade, demonstrated by the production of multiple highly cited papers that rank in the top 1 percent by citations for field and year in Web of Science. Finkelhor, director of UNH’s Crimes Against Children Research Center, is a leading expert on child victimization, child maltreatment and family violence. Frey studies how human-generated stressors, including climate change, agriculture and invasive species, affect ecosystems, particularly soil microbes.

Provost Jones elected fellow by National Academy of Inventors
Wayne Jones, provost and vice president for academic affairs, has been elected to the rank of fellow by the National Academy of Inventors, which includes U.S. and international universities as well as governmental and nonprofit research institutes. The NAI has more than 4,000 members and fellows from more than 250 institutions worldwide.
UNH and Durham community team up to help students at risk of homelessness

Students who had nowhere to live during the month-long winter break and no permanent home were able to find shelter through “Inn Between,” a new program created for students at risk of homelessness. Joan Glutting, a professor of psychology and faculty fellow who helped start the program, identified at least 38 at-risk students on the Durham campus, based on financial aid classifications. In partnership with the Durham Community Church, Inn Between helps students request emergency funding for basic needs, find temporary housing and connect with resources for emergency food and long-term housing.

Partnership creates next generation of ocean mapping with autonomous sailboat

UNH is developing a high-tech, unmanned sailboat that will help researchers map the ocean floor. The 72-foot Saildrone Surveyor, to be deployed in spring 2020, will be capable of going out to sea for up to a year. The project is the result of a three-year grant from the National Oceanic and Atmospheric Administration (NOAA), in partnership with Saildrone, Inc., a California company that designs and manufactures wind and solar-powered autonomous surface vehicles, and the Monterey Bay Aquarium Research Institute.

Paul College named among top 100 business schools for four years running

For the fourth consecutive year, the Peter T. Paul College of Business and Economics has been ranked as one of the nation’s top 100 business schools. Poets&Quants for Undergrads released its list of 2020 Best Undergraduate Schools, which ranks Paul College 35th for alumni satisfaction, 56th for career outcomes and 67th overall.

4-H Science Bonanza attracts future scientists to Manchester’s STEM Discovery Lab

Seventy-five children ages 4 to 13 enjoyed a day of hands-on STEM activities at the third annual 4-H Science Bonanza, hosted by UNH Manchester in early December. The free event invited children to operate a remote-controlled robot, build a simple computer, create a hydroponic garden, learn about maple syrup, and explore new design and building techniques and more. Participants were also encouraged to visit the 4-H Science Expo, which promoted ongoing STEM 4-H programs in Hillsborough, Rockingham, Merrimack, Strafford and Cheshire counties.

Sports Illustrated features law school professor’s predictions for the 2020s

The new decade will see some dramatic changes in the sports industry, according to a Sports Illustrated feature written by Prof. Michael McCann, director of the Sports and Entertainment Law Institute at the UNH Franklin Pierce School of Law. In his article, “Five Sports Business Predictions for the 2020s,” McCann writes that college athletes will likely be able to license their names, images and likenesses and that the major sports leagues will encounter challenges to their traditional revenue streams.
THE NEW PSU

- The Academic Unit (AU) Council is meeting monthly to review and work on streamlining administrative roles in order to operate on a more efficient model.
- Our revitalized Student Life program is showing results. Our renewed embrace of Greek life is continuing apace, and two nationally-affiliated sororities are set to colonize on campus this spring. We also have a new connection with the National Society of Leadership and Success, the nation’s largest leadership honor society. Students with exceptional academic standing or leadership potential are eligible, and 75 percent of our nominees have processed through the program, exceeding the national average.
- Academic Affairs is meeting weekly with Institutional Effectiveness to discuss institutional assessment, particularly revising the Academic Review process and document.
- PSU is partnering with The Jed Foundation (JED), a national nonprofit that protects emotional health and prevents suicide for our nation’s teens and young adults. In November, undergraduates participated in a survey that provided a baseline on the University’s programs, systems, and challenges related to mental health, and a JED consultant visited campus to meet with student leaders and review the survey results with a dedicated task force. A JED update will be shared with the campus community early in the spring semester. The collaboration will continue for the next three years. When completed, PSU will be only the second certified JED Campus in New Hampshire.
- Several state legislators attended our Showcase of Student Engagement, in which nearly 1,000 students discussed their projects, research, and scholarship achievements. In addition, we’ve been meeting with the New Hampshire Public Higher Education Study Committee (a joint House-Senate Committee) to help it better understand the needs of students and the opportunities higher education presents.
- November’s initial session on campus sustainability drew over 100 faculty and staff from all corners of the institution. A second session was held in December, and additional meetings over the next few months will be held in support of the University’s sustainability plan, to be submitted in April.
- The Education, Democracy, & Social Change Cluster hosted three evening sessions that focused on providing students with an overview of the new and free Praxis Core study materials. Student response was overwhelmingly positive.
- Event highlights include another timely Sidore lecture on election issues, a festive First Fire event, superb musical performances, The Beauty Queen of Leenane theatre production, and a presentation on hazing that featured Evelyn Piazza, a nationally-known speaker who shared her painful but valuable experience.

ENROLLMENT

- We have launched several new initiatives to increase enrollments for Fall 2020, including the North Woods Connection, aimed at students from Maine and Vermont. Another new program, tentatively called the “Summit Program,” will be an opportunity for students who fall slightly below our typical academic standards, but who demonstrate promise in other ways, to enroll. An initial pilot of 75–100 students is being planned for fall. Earlier this year, we announced a program that paves the way for qualified students who earn associate degrees in liberal arts from the Community College System of New Hampshire (CCSNH) to continue their
college education at PSU. In December, we took this initiative one step further by guaranteeing admission to students who have earned an associate degree in any discipline from any accredited community college.

- We met with international high school guidance counselors from over ten different countries and discussed opportunities for bringing more international students to Plymouth. The counselors learned about the student experience for international students, the admissions process, and the PSU community.
- Academic Affairs and Student Financial Services met with representatives from the New Hampshire Department of Corrections to discuss the possibility of gaining eligibility for federal “Second Chance” grants that would fund higher education for incarcerated individuals in our state.

UNIVERSITY ADVANCEMENT, MARKETING, AND EXTERNAL RELATIONS

- Website enhancements under development include a new “touchable video” guide to campus.
- New on-site enrollment marketing will be deployed at New Hampshire ski resorts this winter.
- Giving to the University for FY20 is currently surpassing last year’s cash total.
- PSU raised over $140,000 from 686 individual donors during Giving Week in December.
- November’s “Swipe it Forward” Program, through which students donate meal swipes to aid their food-insecure peers, set a new record. Approximately 2,500 meals were donated.

FINANCIAL UPDATE

- We are focusing on our three-year economic sustainability plan, to present to the board of trustees in April. A well-attended campus session in November detailed our current budget and various financial indicators.
- Finance & Administration has divided core functions into two distinct offices: Compliance, Analysis and Planning, and Financial Services.

IMPACT IN OUR WORLD

- New Hampshire has the nation’s highest percentage of high school students reporting daily use of electronic vapor products (e-cigarettes), and the University received a $48,000 grant from the CVS Health Foundation to implement a program to educate teens about the dangers of e-cigarettes.
- A Plymouth State graduate and current student has been named Superintendent of the Year by the New Hampshire School Administrators Association. Mark MacLean, superintendent of the combined SAU46 Merrimack Valley and Andover districts, received his Certificate of Advanced Graduate Studies degree from PSU and is currently enrolled in the University’s doctoral program in educational leadership.
- A renewed Foreign and Domestic Travel Oversight Committee is setting the stage for increased international interactions and opportunities.
- PSU gave a presentation on our Integrated Clusters learning model to 40 visiting NH business, community, and educational leaders at the Leadership New Hampshire Conference hosted at PSU in November. The event was coordinated by former USNH Chancellor Stephen Reno.
- PSU has recently received three honors recognizing our healthy campus environment. The Exercise & Sport Physiology Program was distinguished as a National Strength and Conditioning Education Recognition Program; PSU finished first in New Hampshire and second in New England in the Association of Outdoor Recreation and Education national outdoor challenge; and the University received a Gold Level Workplace Health Achievement Award from the American Heart Association.
- The Open Learning & Teaching Collaborative Team hosted visits from the director of information technology for the California State University System, faculty from Lakes Region Community College, and the staff of the Digital Learning and Inquiry Lab at Middlebury College. We open our doors to colleagues from across the country in order to share our practices and learn about how local, regional, and national programs and initiatives are shaping current higher education.
This report covers the major activities and accomplishments that were achieved as well as the challenges identified since the report to the Trustees on October 24-25, 2019.

Major Activities and Accomplishments

Academic Quality

Accreditation

- In December the college received the evaluation team report from the Commission on Collegiate Nursing Education (CCNE) site visit in October. This visit reviewed both the baccalaureate and master’s degree programs. CCNE confirmed that both programs meet each of the four standards, noting only one compliance concern: the current program director (who leads both programs) has not completed a doctoral degree. The report also notes that the director is currently pursuing a doctorate in educational leadership at Plymouth State University and should complete the degree in late 2021.

  CCNE protocol allows the college to respond to the report, which it will in early January. The response will provide further documentation of the program director’s progress in the doctoral program.

  CCNE will consider the evaluation team report and the college’s response during its Spring 2020 meetings; no adverse action is expected.

- The New Hampshire Department of Education has confirmed April 9, 2020, for an on-site evaluation of three School of Education programs: Deaf and Hearing Disabilities; Blind and Vision Disabilities; and Digital Learning Specialist. The remaining programs will undergo a paper review. All materials are due to the Department on March 7, 2020.

- The New England Commission of Higher Education (NECHE) has confirmed a due date of January 15, 2021, for receipt of the college’s scheduled fifth-year interim report.

- The Global Accreditation Center for Project Management Education Programs (GAC) has confirmed Spring 2022 for an on-site evaluation of the Master’s in Project Management program.
Program Development

- The School of Education is developing a Life Science certification program at the post-baccalaureate level, to be presented to the Council for Teacher Education for approval for the 2020 – 2021 academic year.
- Undergraduate Studies has developed two new minors (Professional Sales and Accounting) that have been approved through the Undergraduate Curriculum Committee.

Program Review and Assessment of Learning Outcomes

- The Business Management program is currently under review with the goal of creating workforce aligned concentrations in Leadership, Entrepreneurship, Venue Management, Nonprofit Management, Professional Sales, Public Service Management, Business Analytics, Supply Chain Management, Sustainability, and Hotels, Restaurants and Travel. The BS, Public Service Management program is currently under review for alignment with municipal and state employee workforce needs. Additionally, the Communication Studies program is also under review with anticipated changes for Fall 2020.
- In Fall 2019 we expanded the Student Learning Outcomes Assessment initiative beyond General Education and capstone courses by including program courses within the Health Care Management and Health and Wellness programs. Degree-level learning outcomes assessment was added to six Healthcare/Science courses for Fall 2019. In winter 2020, five courses in Psychology/Social Sciences will incorporate degree-level learning outcomes assessment for the first time.
- In November, undergraduate writing faculty across the College gathered with the aim of ensuring that they are providing the best possible writing instruction for our students. Faculty teaching GSC’s introductory writing course, ENG500: The Writing Process, and capstone courses across disciplines, reviewed the outcomes assessment data that they collectively generated during the past academic year. They discussed strategies to continue to support our students in reaching capstone level proficiency in writing across the curriculum. Academic Center Director and Fulltime Faculty, Dr. Rita Kondrath, and Dean, Dr. Tamara VonGeorge, explained the addition of a new writing competency, Use Information Effectively to Accomplish a Specific Purpose, and the adjunct faculty members engaged in a norming session, which generated lively discussions of appropriate expectations for our undergraduate students at different points in their academic journey. The event was another testament to how invested our faculty are in improving our courses and teaching practice to ensure that GSC students learn and succeed.
Granite State College
Report to the Trustees
January 16-17, 2020

Faculty Development

• As part of the College’s efforts to improve instruction and learning, faculty-related data were collated from four sources: student course evaluations; faculty peer reviews; reflective teaching analysis surveys; and the Noel Levitz Priority Survey for Online Learners. Common themes emerged across all data sources and faculty development efforts are planned in conjunction with academic center teams on course topics including:
  o Accurate and clear information about course expectations
  o Timely student feedback
  o Quality engagement between faculty and students, and peer to peer interactions

• The following faculty development efforts seek to enhance quality teaching practices at the College:
  o Continuous review of faculty data points to identify critical topics, such as student course evaluations, faculty peer reviews, faculty reflective teaching surveys, and student and alumni annual surveys.
  o Faculty development sessions and resources that provide critical information on essential data-driven topics
  o Design and development of a curated repository of evidence-informed teaching practices

• Faculty development sessions, “just-in-time” resources, and a curated repository of evidence-informed teaching practices are parts of the plan to continue to enhance quality and monitor benchmarks for improvements and enhancements needed to ensure ongoing quality review and responsiveness.

• The College launched a new micro-credential for faculty, “Engaging Online Teaching Practices.” This offering was developed to solidify a common understanding about what quality online teaching practice looks like at Granite State College, as well as to provide opportunities for faculty to collaborate and learn from fellow GSC faculty members and contribute to a growing repository of GSC-led teaching and learning toolkits. Although the micro-credential launched just over a month ago, 15% of GSC’s adjunct faculty have completed it and an additional 25% are in progress, with multiple opportunities in 2020 for faculty to complete the micro-credential.

• The School of Education is moving into the second year of faculty groups in specific areas of analysis for refining data and quality goals, with subgroups convened for data, open education, and alumni/partnerships
Prior Learning Assessment

We have continued to expand our Institutional Validation of workplace learning. Over the past quarter we have validated the following:

- Primex – Emerging Leaders Program
- New Hampshire Certified Recovery Support Worker

Support for Students

- The College has established a partnership with Talent Search, a Trio grant program, to support affordability for first generation, low-income New Hampshire students.
- The Registrar’s office has partnered with Academic Affairs to create transfer pathway guides in TES. The student facing forms define a clear path of transferability between the community colleges and Granite State College. Eleven guides have been made public to date. In addition, the collection of transfer equivalencies (credit courses, prior learning- workplace, military, and certifications) is now available on the CollegeSource® TES (Transfer Evaluation System). TES is a dynamic, robust library of course equivalencies that Granite State College has previously accepted and continues to update daily.
- Responding to areas that fell below national benchmarks, College staff have been conducting classroom visits in classes with high first-time enrollment to promote support services, with a virtual version of this presentation available in the faculty portal and in online classes with at least 25% “first-time at GSC” enrollment.
- To improve accessibility for students and programs, the College has relocated its Manchester campus from the Mill West Building (across from CMC) to the Brady Sullivan Tower (1750 Elm Street).

Engagement

Academic Engagement

- A new multi-dimensional course development/review approach for high-enrolled courses was developed. The goal of this approach was to establish and/or formalize protocols related to collaborative front-end engagement in course design and construction and instill a continuous quality improvement cycle.
- In tandem with this effort, a data team began to meet regularly to establish a common data set related to academic engagement, course review: pre- and post- course design
metrics, and identify targeted initiatives geared toward facilitating student success. In early 2020, the team will have both pre- and post-data to review progress and identify areas for improvement at both the course level and the course review approach.

**Partnerships**

- **Current Partnerships include:**
  - *Institutional Enrollment:* Bank of New Hampshire; Community College System of NH; Hypertherm; MaineHealth; Frisbie Memorial Hospital; Wentworth Douglass Hospital; Catholic Medical Center, Concord Hospital, City of Manchester; Cornerstone VNA; Easterseals; Talent Search; The Moore Center; Windham Professionals, Inc.
  - *Course offerings:* Friendship Charter School; Manchester Fire Department
  - *Online Delivery/Consultation and Design Needs:* Keene State College; USNH.
  - *Ongoing Professional Development:* NH Lodging and Restaurant Association; Network4Health; SOS Harbor Homes.
  - *Current Professional Development:*
    - **City of Keene:** The City of Keene and Granite State College will be hosting and facilitating the *Foundations of Project Management.* This three-day workshop series will focus on the lifecycle of project management and implementation; participants will walk away with a project plan in place. Other area businesses attending the workshop series are Electronic Imaging Materials, Inc., Timken Super Precision, Smiths Medical, and Bensonwood Homes. The series is set to take place right after the new year.
    - **SOS Recovery Community:** SOS and Granite State College have teamed up to offer their employees an *Introduction to Leadership and Foundations of Management.* The eleven, half-day workshop series introduces participants to core concepts of management and leadership development. The workshop series will take place at our Rochester campus, beginning mid-January and concluded with a Community of Practice, and online community to share goals and continued learning, at the end of March.

**Recognition**

- **Courtney Rice** and **Dr. Kathleen Patenaude** presented “*Project-Based Assessment Strategies Across Linked Undergraduate and Graduate Programs*” at the New England Education Assessment Network Fall Conference at Holy Cross in Worcester, Massachusetts on November 1, 2019.
Granite State College
Report to the Trustees
January 16-17, 2020

• Dr. Tamara VonGeorge, Dr. Carina Self, Dr. Sarah Batterson, and Justin Chase presented “Using Assessment of Students’ Critical Inquiry Capacities to Spark Adjunct Faculty Reflection” at the New England Education Assessment Network Fall Conference at Holy Cross in Worcester, Massachusetts on November 1, 2019.

• Courtney Rice and Dr. Kathleen Hipp presented virtually “Health and Wellness, Psychology, and Human Services curricula at Granite State College; Prior Learning Assessments” for the Network4Health NH Workforce Partners Strategic Meeting on October 30, 2019.

• Dr. Carina Self and Dr. Tamara Von George presented a poster session, “Beyond the Pilot: Broad-Based Implementation of General Education Assessment” at the NECHE Annual Meeting on December 12, 2019.

• The School of Education, represented by Dean Dr. Nicholas Marks, was present at the WCET annual meeting in Denver, Colorado to accept the WOW award. The acceptance of the award provided GSC with an opportunity to engage in conversations with other institutions nationwide on technology solutions to challenges in education as well as to discuss options for further technological innovation in distance-based education.
KSC Fall Open Houses
On October 19 and November 1, Keene State hosted two Open House events to highlight the campus and incredible opportunities that are available to students as Keene State Owls. During the two days, 439 prospective students and their 704 guests met with admissions counselors, talked with current students, connected with faculty, toured campus and a residence hall, and learned more about the many supports in place to help students succeed.

Journalism Award for Student Newspaper
In October, Keene State College’s campus newspaper, The Equinox, along with its editors and writers, were awarded a third consecutive Pacemaker Award as one of the top collegiate online student-run media organizations in the United States. These annual awards by the Associated Collegiate Press are considered the collegiate version of the Pulitzer Prize, and are given out annually at the ACP/CMA National Convention in October of each year.

KSC alumnus, Kirk Bobkowski ’14 (B.M. Music Education and B.M. Music Performance) made his Carnegie Hall debut as the tenor soloist for Handel’s Messiah, with the Masterwork Chorus on December 11, 2019. Kirk is currently the Choir Director at Chocksett Middle School, and leads an afternoon vocal studio at Wachusett High School and has performed and been a soloist with many ensembles.

Roger Martin (Journalism, Multimedia, Public Relations) presented work from his new book, For All The Tea in Zhōngguó, at Pier 21 Immigration Museum in Halifax, Nova Scotia as part of their celebration of immigration. He was introduced by U.S. Consul General Kevin Skillings and read work in English while Dr. Shao Pin Luo of Dalhousie University spoke the same work in Mandarin.

In November 2019, three current and former KSC professors of Sociology and Criminology, Dr. Peter Stevenson, Dr. Niall Moran, and Dr. Carolyn Keller, presented a paper, titled “Strain and Institutions: Comparing Recent Sport Sexual Abuse Scandals in B1G Universities” at the annual meeting of the American Society for Criminology, San Francisco, CA.

KSC Parent/Family Weekend
Keene State welcomed 129 parents and families to campus on Saturday, October 19 for Parent/Family Weekend. The annual event is a wonderful opportunity for families to visit with their student, stroll campus, meet campus leaders, and enjoy a beautiful fall weekend in Keene. Just under 400 students and families together participated in the events of the day.

Dr. Patricia Pedroza Gonzalez (Women’s and Gender Studies and American Studies) received two grants from the New Hampshire Charitable Foundation—an $8,000 grant for “Sustaining the Visibility and Impact of the KSC Women’s and Gender Studies Program,” and $13,775 for “You Have Our Trust,” for curriculum development in Critical Ethnic Studies.

Dr. Karen Cangialosi (Biology) delivered the keynote address at the major conference on development and delivery of open-resource publications for Biology coursework, Sustainability Challenges for Open Resources to promote an Equitable Undergraduate Biology Education (SCORE-UBE). The speech, “Open Educational Practices: Access, Equity and Connection,” was presented at Bates College, Lewiston, Maine, in October 2019.

Dr. Sasha Davis (Geography) published an article with two KSC Students, Lexi Munger ’23, and Hannah Legacy ’16. “Someone else’s chain, someone else’s road: U.S. military strategy, China’s Belt and Road Initiative, and island agency in the Pacific” was published in the Island Studies Journal. The article examines the shifting economic, military, and political relationship between the U.S., China, and island states in the Pacific region.

Architecture student, Hunter Davis ’19, has been awarded a Student Stipend Grant. A paper he wrote with Dr. Fernando Del Ama Gonzalez (Sustainable Product Design and Architecture), “Building Energy Simulation: Case Studies with Water Flow Glazing” has been accepted for publication, and will be presented at 5th World Multidisciplinary Civil Engineering-Architecture-Urban Planning Symposium (WMCAUS 2020) to be held in Prague, Czech Republic in June, 2020.
Dr. Bill Bendix (Political Science) published an article with co-author Gyung-Ho Jeong in Political Research Quarterly, titled “Gender and Foreign Policy: Are Female Members of Congress More Dovish than Their Male Colleagues?” The article is being shortened and reproduced for the online blog published by the US Center of the London School of Economics.

The Mason Library Archives, under the leadership of Rodney Obien, received a New Hampshire Moose Plate Grant. The funds will be used to continue processing and preserving work on the Jonathan Daniels collection. As part of the larger social justice special collections, these paper and other physical materials belonged to Jonathan Daniels, the seminarian, Keene native, and civil rights martyr recognized by the Episcopal Church.

**KEENES STATE PARTNERSHIPS**

**American Red Cross Blood Drive**
Keene State’s Community Service Office was named as a winner in the American Red Cross Pump It Up Challenge, which recognizes high-achieving blood drive sponsors that have grown the number of blood donations collected in their community to help hospital patients in need. Committed to helping save lives, the Community Service Office hosted 8 blood drives and collected 282 Red Cross blood donations for patients in need over the past 12 months (January – December 2019).

**Service-Learning in our Community**
During the Fall 2019 semester, students in English 307: Writing in the World worked on an eight week service-learning project with four local nonprofits: Fast Friends, the Hannah Grimes Center for Entrepreneurship, the Keene Housing Kids Collaborative, and Big Brothers Big Sisters of New Hampshire - Greater Keene and Monadnock Region. Students revised existing or created new professional writing documents for each client, and the writing teams developed a formal report with final versions of their documents to give to their clients.

**Public Relations Collaboration with Athletics**
The Journalism, Multimedia, Public Relations department, in association with KSC’s Department of Athletics posted the 60th edition of “Inside Owl Athletics” to conclude the fall semester. “Inside Owl Athletics” is a weekly sports magazine highlighting the athletic and academic achievement of KSC athletes. It is the only program of its kind among Little East Conference member institutions.

Dr. Marianne Salcetti (Journalism, Multimedia, Public Relations) and her students in JRN 486 Public Relations Practice are working with the New Hampshire Medical Society and the New Hampshire School Nurses Association to develop a statewide immunization awareness public relations campaign. The campaign will be completed during the spring 2020 semester, and distributed statewide.

Dr. Jason Pellettieri’s (Biology) lab published a paper in the journal Developmental Biology, titled “The exon junction complex is required for stem and progenitor cell maintenance in planarians.” Two of Pellettieri’s former students were authors on the paper – Casey Kimball ’17 (now at Intellia Therapeutics in Cambridge) and Vanessa Poirier ’17 (now a Pharm.D. student at the University of South Carolina). The other two authors, Kaleigh Powers ’15 and J.P. Dustin ’15, are KSC graduates who worked as grant-funded research technicians.

**Alumni Participation and Partnerships**
The Advancement office hosted or collaborated with Athletics, the Cohen Center, KEA, Academic Affairs, Academic and Career Advising, The President’s Office, and Student Involvement, hosting eighteen events between July 2019 and December 2019. There were over 1,200 participants, including more than over 525 alumni. The majority of alumni (450+) attended between one and four events, 16 alumni attended between five and nine events, and nine alumni attended ten events or more. Due to the success of the events and partnerships, we are re-imagining our Alumni Reunions to collaborate consistently and effectively with our affinity groups and campus partners.

**Florentine Films Alumni Panel**
Since 1995, 70 Keene State College Film Studies students have interned at Ken Burns’ Florentine Films, and 25% of the current staff at Florentine are KSC alums. A panel of Keene State alums who interned at Florentine came to campus to share how their internship experience was pivotal to their professional preparation as filmmakers. Dan White, a former Keene State student currently working at Florentine Films, moderated the panel. The panelists were Lynne Carrion ’18 who is presently working at Florentine Films as an apprentice editor on their forthcoming documentary on Ernest Hemingway; Dave Mast ’96, who is currently the technical director and sound editor at Florentine Films; and Bryant Naro ’08, co-director with Meagan Frappiea ’06 of the production company, Slate Roof Films, LLC.
UNIVERSITY SYSTEM OF NEW HAMPSHIRE
BOARD OF TRUSTEES

(January 17, 2020)

Motion Sheet

GOVERNANCE COMMITTEE

To: Board of Trustees
Re: Motion to Amend Board Policy regarding Implementation of the Student Trustee Election Law (BOT I.A)

PROPOSED MOTION

MOVED, on recommendation of the Governance Committee, the Board of Trustees hereby adopts the amendment to the Board’s policy on Implementation of the Student Trustee Election Law (BOT I.A), as set forth in the attached materials.

EFFECT OF PROPOSED ACTION AND RATIONALE

The proposed motion would amend the Board’s policy on Implementation of the Student Trustee Election Law by broadening the eligibility criteria for candidacy to include graduate students. In addition, the amendment would clarify existing policy to make all full-time matriculated undergraduate and graduate students eligible to vote for student trustee.

PRIOR REVIEWS

The University System Student Board asked the Governance Committee to consider making graduate students eligible to serve as student trustees by amending the current Board policy requiring student trustees to be a “full-time matriculated undergraduate student.” The Governance Committee discussed the concept and asked the Administrative Board to consider a couple of options for implementation. The Governance Committee received and considered the Administrative Board’s recommendation and approved the recommended amendment.
SUBSEQUENT ACTION REQUIRED

If the motion is adopted by the Board of Trustees, the amendment will be final and effective immediately.

SUBMITTED BY:

Ron Rodgers
General Counsel

Date Prepared: January 9, 2020 For the Meeting on: January 17, 2020

-- End of Motion Sheet --
Recommendation of the Governance Committee to amend Board Policy, BOT I.A, Implementation of Student Trustee Election Law, as follows (additions are in blue and underlined; deletions in red strikethrough):

A. Implementation of the Student Trustee Election Law

1. **Preamble.** To guide the conduct of the student trustee elections authorized under Chapter 124 of the laws of 1979 and subsequent amendments, the Board of Trustees under the authority of RSA 187-A:13 and 16 adopts the following policy:

2. **Campus Rotation.** Chapter 76 of the New Hampshire Laws of 2011 provides that the 2011 elections for student trustee will occur at the University of New Hampshire and Plymouth State University, the 2012 elections at Plymouth State University and Granite State College, the 2013 elections at Granite State College and Keene State College, and the 2014 elections at Keene State College and the University of New Hampshire. Unless the law is repealed or amended, the election for the student trustee in subsequent years shall rotate among the campuses in the same order.

3. **Candidates.** Any full-time matriculated undergraduate or graduate student at the institution scheduled for the student trustee election shall be entitled to run as a candidate for student trustee. This student should appear on the ballot provided:

   3.1 The student is at least a second-semester sophomore has completed at least three semesters or terms at the institution they would represent; and

   3.2 The student has submitted a petition with not less than 50 student signatures to the appropriate student government representative at least 2 weeks prior to the election, except at Granite State College where the student is required to submit a statement of interest to the President's Office at least 2 weeks prior to the election.

4. **Voting.** All full-time matriculated undergraduate and graduate students eligible to vote for student body president at the institution scheduled to hold the student trustee election shall be eligible to vote for student trustee.

5. **Election Procedures.** Each institution shall carry out the election of the student trustee under the same procedures used for the election of the student body president. In case of conflict between those procedures and this policy, the terms of this policy shall control.

-- End of Proposed Amendment --
UNIVERSITY SYSTEM OF NEW HAMPSHIRE
BOARD OF TRUSTEES

Motion Sheet

University System of New Hampshire

To: Board of Trustees
Re: Approve proposed maximum FY21 mandatory fees and room & board

REQUEST FOR BOARD ACTION

MOVED, on recommendation of the Financial Affairs Committee that, effective for fall semester 2020 (FY21), mandatory student fees be adopted in amounts not to exceed $3,418 at UNH-Durham; $2,884 at KSC; and $2,622 at PSU; AND FURTHER, that maximum housing and dining rates be adopted as the maximum per the attached schedules.

SUMMARY OF PROPOSED ACTION

This motion is requesting approval of the proposed maximum room, board and total mandatory fees for each USNH institution for both resident and nonresident students.

RATIONALE FOR PROPOSED ACTION

The rates for student services are being recommended by the campuses based on review of essential ongoing direct and indirect operating costs plus any needed debt service payments, repairs, replacement, refurbishing, etc., for each service function and in accordance with anticipated personnel and support budget needs (See Attachment A for summary of all proposed housing, dining and mandatory fees). In order to provide flexibility to campus management, a total mandatory fee amount is being approved for each campus, allowing for adjustments between fees if necessary.

PREVIOUS REVIEWS AND APPROVALS

The development of the rates for student fees is the responsibility of campus administration. Representative student groups review the proposed schedule of rates. Written student input is provided to the Financial Affairs Committee through letters from campus student leaders explaining the process and any points of disagreement (Attachments B-D).

RELEVANT GOVERNANCE DOCUMENTS, POLICIES, AND PRACTICES

The Board of Trustees requires that auxiliary student services function as self-supporting entities, ensuring that all direct and indirect costs of the operation are included when determining rates. Financial support from the State for residential life and dining facilities, student unions and bookstores is prohibited by statute. Board of
Trustee Policy (BOT IV.A 2.2) states that “the Board of Trustees, upon recommendation of the Financial Affairs Committee, retains sole responsibility for approval of tuition and fees”.

RESOURCE IMPLICATIONS

The housing, dining and mandatory fees as detailed in Attachment A are deemed adequate by institutional management to balance expected operating expenses and provide sufficient funding of building and equipment replacement and repair.

RISK MANAGEMENT CONSIDERATIONS

None.

SUBSEQUENT ACTION REQUIRED

Approval of the entire FY21 operating budget is scheduled for consideration by the Financial Affairs Committee on June 25, 2020 and the Board of Trustees on June 26, 2020.

-- End of Motion Sheet --
REQUEST FOR BOARD ACTION

MOVED, on recommendation of the Financial Affairs Committee that, effective for academic year 2020-21, the tuition rates as presented on the attached schedule be adopted as the maximum amounts authorized.

SUMMARY OF PROPOSED ACTION

This motion requests approval of the FY21 maximum tuition rates as listed on Attachment A, for nonresident undergraduate students and resident and nonresident graduate students.

RATIONALE FOR PROPOSED ACTION

As a public institution, a portion of USNH’s funding comes from the State of New Hampshire. This state support directly impacts the tuition rate that the Board of Trustees establishes for New Hampshire students. USNH received strong support of both the Executive and Legislative branches in the biennial state budget approved for FY20-FY21. Appropriations in the amount of $85.5 million in FY20 and $88.5 million in FY21 enabled USNH to freeze in-state undergraduate tuition for FY21 at the FY20 rates at the October FAC meeting. Each campus has provided detailed rationale to support their recommendations for graduate rates and for non-resident undergraduate tuition increases in Attachments E-H. The amount of increase and the percent of increase for each rate as compared to the prior year can be found in Attachment B. The rate increases on the schedule are for the maximum increases allowed by the Board of Trustees.

When combined with the proposed mandatory fees, and representative room and board rates, the total undergraduate price of attendance for each institution can be found in Attachment D. The total price of attendance (PoA) for resident undergraduate students will increase 1.2% at UNH and 2.5% for nonresident students; 1.4% at KSC for resident students and 2.5% for nonresidents; 1.1% at PSU for resident students and 2.3% for nonresidents; at GSC, the per credit hour rate will remain unchanged for resident and nonresident students:

PREVIOUS REVIEWS AND APPROVALS
FY21 Undergraduate resident tuition (frozen at FY20 rates) was approved at the October Financial Affairs Committee meeting. At its December 19, 2019 meeting, the Administrative Board discussed FY21 tuition and fees. The Financial Affairs Committee is considering this motion on January 16, 2020.

RELEVANT GOVERNANCE DOCUMENTS, POLICIES, AND PRACTICES

Board of Trustee Policy, (BOT IV.A 2.2), states that “the Board of Trustees, upon recommendation of the Financial Affairs Committee, retains sole responsibility for approval of tuition and fees”.

RESOURCE IMPLICATIONS

The impact of the rate changes for each institution is discussed within the respective narratives provided by each campus.

RISK-MANAGEMENT CONSIDERATIONS

Tuition pricing has been developed on each campus with careful consideration given to the overall PoA and the highly competitive higher education environment.

SUBSEQUENT ACTION REQUIRED

The entire FY21 operating budget is scheduled for consideration by the Financial Affairs Committee on June 25 and the Board of Trustees on June 26, 2020.

-- End of Motion Sheet --
UNIVERSITY SYSTEM OF NEW HAMPSHIRE
BOARD OF TRUSTEES

Board of Trustees

Motion Sheet

University of New Hampshire

To:      Board of Trustees
Re:   Approve $3.34 million in FY20 strategic investments at UNH

PROPOSED MOTION

MOVED, on recommendation of the Financial Affairs Committee, that the University of New Hampshire be authorized to spend an additional $3.34 million over the previously approved FY20 budget for specific strategic purposes.

SUMMARY OF PROPOSED ACTION

This motion approves an additional $3.34 million in FY20 spending by UNH for strategic investments.

RATIONALE FOR PROPOSED ACTION

The FY20 budget was approved by the Board of Trustees in June 2019. The UNH budget as approved (including Law) resulted in an operating margin of $15.1 million or 2.4%. When the budget was approved, the Board was advised that UNH would likely seek approval for additional FY 20 spending for strategic investments that were not yet fully developed. Since that time, UNH leadership has continued its strategic planning process and has identified initiatives to help UNH meet its four strategic priorities: Enhance student success and wellbeing; Expand academic excellence; Embrace New Hampshire; and Build financial strength. Approval for the additional spending is required because the $3.34 million was not included when the budget was approved and will result in a reduction in UNH’s operating margin and a reduction in the consolidated system margin.
RESOURCE IMPLICATIONS

The proposed increase in FY20 operating expenses will result in an $11.8 million operating margin or 1.9% for UNH.

The projected returns on the strategic initiatives are estimated on the attached spreadsheet. It is estimated that within three years, the investment has the potential to increase revenue by $5 million per year and contain costs by $12 million per year.

RISK MANAGEMENT CONSIDERATIONS

The planned reduction in OM is not expected to impact bond ratings. Investments in the initiatives outlined by UNH will better position UNH for attracting and retaining students, diversifying and increasing revenues through research and fundraising. The first phase of consulting work by Huron includes recommendations that when implemented, will strengthen UNH’s financial position.

-- End of Motion Sheet --
2019 IPEDS data shows Master’s programs now make up nearly 16% of completions across all levels of U.S. higher education. For several years, this market has been the primary sector of growth for many institutions—led in large part by the development of online programs.

In October, the National Center for Education Statistics (NCES) released new data about the number of academic programs offered in specific fields of study and how many students completed those programs for the 2017–2018 school year. As a critical dataset for anyone interested in the health of online master’s programs, we’ve done some initial analysis.

What did we learn?
The Survey Says: Number of Online Master’s Programs and Students Completing Them Grows Again, but at a Lower Rate than Previous Years

Another year of NCES distance data—our proxy for online programs—helps add clarity to the often murky master’s market and is summarized below in Table 1.

Table 1. Master’s and Bachelor’s Degree Completions Growth (Compound Annual Growth Rate)

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>6-Year CAGR</th>
<th>YoY Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Master’s Programs</td>
<td>38,700</td>
<td>2.6%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Master’s Distance Programs</td>
<td>8,200</td>
<td>9.7%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Master’s Programs Completions</td>
<td>823,000</td>
<td>1.7%</td>
<td>1%</td>
</tr>
<tr>
<td>All Bachelor’s Programs</td>
<td>77,500</td>
<td>0.9%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Bachelor’s Distance Programs</td>
<td>7,200</td>
<td>5.1%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Bachelor’s Programs Completions</td>
<td>2,088,000</td>
<td>1.4%</td>
<td>.08%</td>
</tr>
</tbody>
</table>

Source: NCES IPEDS. Figures rounded to nearest hundred.

Table 1 indicates that the number of distance master’s programs has grown significantly; more than 20% of master’s programs are now offered via distance format. For comparison, distance programs now represent 9% of all bachelor degree programs. The bachelor’s degree marketplace has grown at a lower rate in terms of the number of programs offered over the six-year period (1% growth), while online bachelor’s programs have grown significantly (5%), although not as much as at the master’s level (10%).

Figure 1 shows how the 25 largest master’s degree programs have performed and how competitive their markets are based on the number of institutions offering distance programs within the same fields of study. The top 25 largest master’s programs are profiled by their respective fields of study and numbers of degrees completed in 2018. As there is not yet a formal measure of the number of completions by distance programs alone (although this data point is high up on our Christmas wish list), we used the total number of completions per program, which includes both distance and non-distance programs.
Figure 1.

<table>
<thead>
<tr>
<th>Color Key</th>
<th>Program Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>General Education, Education Leadership, Curriculum and Instruction, Special Education, Counselor Education, Elementary Education</td>
</tr>
<tr>
<td>Business</td>
<td>Accounting, Business General (2 programs)</td>
</tr>
</tbody>
</table>
What can we learn from Figure 1?

1. More schools are adding more online master’s programs in all of the most popular fields of study.

Not a single top 25 program has declined in terms of the number of programs offered. In fact, over the six-year period measured, 809 new distance programs were reported to NCES, an increase of 42%. This indicates that even for programs of shrinking completions—which likely translates to shrinking enrollments—the competition is increasing and online formats are becoming the norm that many master’s level students expect.

2. Programs focused on computer and information science have seen the highest completion growth rates.

Program completions in the top three computer and information science programs grew by 40 programs, or 34%. It is worth noting that IPEDS categorizes these programs quite broadly compared with many others, and so the comparison may not be satisfactorily apples-to-apples. With that said, however, they are the least saturated in terms of new programs. This trend reflects how institutions are making notable efforts to increase the way that students at all levels can learn technical computer skills; a recent example is Virginia’s recent billion-dollar pledge to grow computer science programs at 11 different institutions.

Technology companies also continue to emphasize new hiring practices based on skill rather than degree requirements, partnering with community colleges and online course providers to fill technology-related jobs. This heightens competition for some master’s programs to demonstrate value beyond skills training. It will also likely lead to increased competition on price—just as Georgia Tech and University of Pennsylvania have done with low cost, predominantly online master’s in computer science offerings.
3. The business master’s market is both a behemoth and a Rubik’s Cube.

The combination of curriculum, cost, corporate partnerships, competition, and convenience often dictate how successful the masters in business programs are. Business-specific programs, in analytics, accounting, and the many different flavors of the all-mighty MBA, will all continue to attract students looking to learn general business skills. While completions in general business master’s programs have declined by some 8,000, the total number of students is well north of the nearest program—social work—with nearly 90,000 more completions.

We do expect, however, that there will continue to be increased offerings from programs in specific business career fields (think masters in healthcare management). Those programs that successfully communicate the value of the business skills they teach along with discipline-specific elements of the curriculum, will steadily draw career minded students looking to skill-up in a specific industry.

4. Education programs have seen sustained declines in both completions and enrollments while new programs continue to pop up.

About 260 new distance programs were reported in 2018 while there were nearly 13,000 fewer completions. The combination of demography and competition from institutions and low(er) cost, for-profit providers of professional development make such programs difficult to sustain. It would be risky for an institution to launch new education programs without an established foothold and reputation for providing education programs already.

5. Engineering program growth (through the lens of IPEDS) is deceptive.

IPEDS indicates that engineering program growth has matched completion growth, indicating relative health and room for further expansion. But this is only part of the picture. Complimentary data from the Council of Graduate Schools (CGS) shows an 8.3% decrease in first-time enrollment for master’s-level engineering programs from 2017 to 2018; data that may not have yet caught up with completions.

While declining international student enrollment plays an outsized factor in engineering graduate programs that have historically attracted more international students, lower international student enrollment will continue to more broadly impact all programs at varying levels. The CGS reports a 1.3% decline in international student enrollment between 2017 and 2018 across all graduate programs.

The Bottom Line

While we continually read of declines and constraints in the higher education sector, online programs—particularly at the master’s level—have been, and will continue to be, in growth mode. Some of the growth discussed here is simply the continued normalization of online education and comes of little surprise.
The other story, however, is where growth opportunities lie for institutions considering development of new master’s programs and what the reasonable expectations from those programs should be. Entering saturated fields of study by bringing a non-distance program into an online format or building a new program must take into account a range of factors. While the national trends, positive or negative, are not prophetic, or even the most relevant consideration for every local market, they are undeniably important considerations.

https://encoura.org/2019-ipeds-update-five-insights-into-the-online-masters-market/
Meet the English Professor Creating The Billion-Dollar College Of The Future

Mar 28, 2019
By Susan Adams

The tall, silver-bearded president of Southern New Hampshire University is beaming as he takes a brisk walk through the halls of the Mill, the private not-for-profit school’s vast nerve center. There are no students here. Instead, the converted textile factory on the banks of the Merrimack River in Manchester, New Hampshire, is packed with row after row of gray cubicles staffed by 1,700 employees servicing the exploding online enrollment—some 135,000 and counting—at SNHU, as the school is known. “We have set out to be the Nordstrom’s of higher education,” says Paul LeBlanc, 61. “We want to have the best-in-class customer support.”

A former English professor from a working-class immigrant family, LeBlanc has taken his passion for technology and, cherry-picking what many of the much-maligned for-profit colleges did right, revitalized a dying institution. Like the for-profit schools, SNHU attracts students with a nationwide advertising campaign that eats up as much as 20% of its operating budget. And as the for-profits have done, SNHU targets a nontraditional demographic, the 37% of American college students over age 24, many of whom have jobs and families. They can’t afford and don’t want a residential campus experience. His teaching staff: an army of 6,000 adjuncts who earn as little as $2,200 per course.

With an open enrollment policy whose only requirement is a high school degree or a GED, SNHU’s priority is supporting its growing student body. “It’s a word we can’t use in nonprofit higher ed—that students can be students but they can also be customers,” says LeBlanc. When prospective applicants place a call or send an email inquiry through SNHU’s site, one of its 300 admissions counselors responds in less than five minutes. At traditional schools it’s standard practice to require applicants to track down their own transcripts. SNHU takes care of that chore within two days, at no charge.

By the numbers, the strategy is an overwhelming success. Though the sticker price for an online student to earn a four-year bachelor’s degree with no transfer credits is just $40,000 and SNHU hasn’t raised tuition since 2011, margins in the online division are a fat 24%. Since LeBlanc took over in 2003, SNHU has gone from a little-known third-rate undergraduate business school with 2,800 students, no endowment and a budget that was barely in the black, to America’s biggest university by enrollment with 97% of its students online. (SNHU still has a 300-acres campus, dotted with slick new buildings paid for with online revenue.) He is projecting a 2020 budget of nearly $1 billion, a surplus of at least $60 million and more than 300,000 students by 2025.
But how valuable is a SNHU degree? Federal data on SNHU’s students’ completion rates and its graduates’ earnings, and its poor showing on college rankings, raise questions. SNHU has never made the cut for Forbes’ annual roster of America’s 650 best colleges. LeBlanc says he doesn’t care: “I feel really strongly about not trying to climb the status ladder.”

Status aside, the federal government’s College Scorecard, which tracks median alumni earnings 10 years after graduation, pegs SNHU grads’ salaries at $45,400. By comparison, graduates of the University of New Hampshire’s main campus in Durham earn a median of $51,400 (the government doesn’t calculate a national median). LeBlanc says College Scorecard is a blunt instrument and, given the school’s dramatic growth, doesn’t accurately reflect the experiences of alumni. SNHU recently paid for its own survey that found its online alumni were earning an average of $51,000 within 12 months of graduation.

As for its six-year completion rate, a measure that’s considered important, SNHU’s is 48% for students pursuing bachelor’s degrees, though LeBlanc says, somewhat defensively, that if students who drop out after their first course are removed from the count, it jumps to 52%. That still puts SNHU multiple points below the national average completion rate of 60.8% for students pursuing bachelor’s degrees, according to government figures. “I’m proud of our completion rate and I also want it to get much better,” he says.

LeBlanc traces his passion for educating nontraditional students to his own underdog upbringing. As a small child, he lived on one of the 16 subsistence farms that made up the tiny New Brunswick village of Gaytons. His mother tended a scrappy vegetable garden and the family cow while raising LeBlanc and his four older siblings. His father worked on an American air base in Goose Bay, 27 hours away by car, living apart from the family for months at a stretch.

At the suggestion of an uncle, when LeBlanc was 3 the family moved to Waltham, Massachusetts, a working-class community where LeBlanc’s father worked construction and his mother got a factory job stitching car tops while moonlighting as a housekeeper for wealthy families. “She plunked me down in [her client’s] libraries and gave me kids’ books to read,” he says. “By first grade I was still not very good at it.”
Revenue from SNHU’s online division has helped pay for a half-dozen new buildings on campus, including a residence for 300 students, Monadnock Hall (upper left), a 50,000-square-foot library, and a $30 million stadium.

While his siblings went straight from high school into trades like bricklaying, plumbing and carpentry, LeBlanc followed friends to Westfield State. “All of a sudden learning came alive for me,” he says, and he crammed five English classes into a single semester. Working construction during summers to pay his way, he earned a master’s in English from Boston College in 1982 and a Ph.D. in rhetoric, composition and technology from the University of Massachusetts at Amherst eight years later.

He landed a teaching job at Springfield College while he was finishing his doctorate. Unlike many English department traditionalists, who wanted to stick with printed books, LeBlanc, then with shoulder-length hair and an earring, was excited by the possibilities technology offered. Outside of class, he spoke at academic conferences about how textbook publishers should develop digital tools.

Houghton Mifflin, knowing he was right, hired him in 1993 to create a higher education technology unit. He took a three-year leave of absence from Springfield and developed collaborative writing software that he describes as an early version of Google Docs. At the end of the third year, “Houghton Mifflin offered me more money than I thought I’d ever make and a lot more than I was going back to,” he says. But he turned it down. “I always felt most at home on a campus, and I felt I could make the most impact if I could work for and with students.”

In 1996, at age 39, he became president of Marlboro College, an unconventional school with a strong academic reputation and a small student body in rural southern Vermont. Marlboro was facing collapse when he arrived. Enrollment had dropped to 300 and the school had borrowed $1 million against its endowment. In the space of five years, he proved himself an effective fundraiser, bringing in $44 million from a combination of foundations and wealthy individuals like the late Jerome Kohlberg of the private equity giant KKR and his wife, Nancy.
But the Marlboro board rejected LeBlanc's proposal to introduce online courses, fearing it would dilute the school's commitment to fostering close ties between professors and students. By the early 2000s, he was ready to leave. That was when he heard that Southern New Hampshire University was looking for a new leader. It had been founded in 1932 as New Hampshire Accounting and Secretarial School. During World War II, most of its students were servicemen at the Manchester Air Base, where they took typing, business English and math. By the early 1950s, the school had just 25 students and almost closed. Revived by new extension programs for service members on bases around New England and Puerto Rico, it grew and renamed itself twice, first as New Hampshire College and then, shortly before LeBlanc arrived, Southern New Hampshire University.

Fortunately for LeBlanc, SNHU’s board of trustees welcomed new ideas. When he was studying for his master’s, he met Clayton Christensen at a pickup basketball game in a Boston church basement and the two became close friends. A professor at Harvard Business School, Christensen is credited with laying out the notion of disruptive innovation, when entrepreneurs invade a marketplace with cheap new technology or ideas. Later, Christensen created a stir in a 2013 *New York Times* op ed in which he predicted that low-cost online courses were the disruptive innovation in higher ed that would drive a quarter of colleges and universities out of business in 10 to 15 years. In 2017 he doubled down on that forecast, saying that half of America’s 3,900 colleges would likely go bankrupt.

LeBlanc agreed with Christensen (who sat on SNHU’s board from 2004 to 2012), and he felt a personal affinity for the market served by the for-profits. “Most of traditional higher ed looked at adult learners as an afterthought,” he says. He knew those students presented a huge opportunity and that they were best served online. But when he arrived, SNHU’s online division had only 16 employees and a few hundred students.
To expand, his first hire was Steve Hodownes, who had been president at Embanet, a Toronto-based for-profit company that set up online divisions for colleges and universities, taking a cut of revenue that could run as high as 70%. LeBlanc wanted to keep that money in-house and build SNHU’s online program from the ground up.

To design SNHU’s courses, LeBlanc used an approach pioneered by the Open University in England, a mega-school that specializes in distance learning. Like OU, SNHU relies on subject matter experts and professional course designers to put together its online courses, which run for eight weeks for SNHU undergrads and 10 weeks for graduate students. Some adjuncts complain that SNHU’s approach is like painting by numbers (“I feel like a glorified grader,” says one creative writing adjunct who doesn’t want to be quoted by name). But enough want the job that SNHU hires just 3% of applicants, many of whom have Ph.D.s.

Since LeBlanc took over in 2003, SNHU has gone from a little-known third-rate undergraduate business school with 2,800 students, no endowment and a budget that was barely in the black, to America’s biggest university by enrollment with 97% of its students online.

Before starting to recruit students, SNHU needed to streamline enrollment, financial aid, and course sign-up. LeBlanc had the online staff sketch out the process on a white board. “It looked like a schematic of a nuclear submarine,” he says. “It’s a miracle anyone took an online course with us.”

LeBlanc ditched the old system. In addition to admissions staffers, he hired 160 people to connect students with financial aid. Fifteen SNHU employees spend all their time helping veterans and active-duty service members access government benefits. Military personnel account for 15% of SNHU’s student body. Once enrolled, online students are assigned academic advisers who use Salesforce customer management software to monitor them. If a student falls behind, her adviser steps in, giving advice about how to file for an extension or referring her to SNHU’s free online tutoring.

But great customer service and increased name recognition following a new national advertising campaign (think subway ads and 30-second TV spots) didn’t help when the recession took hold in 2009. Facing his first operating deficit, a projected $3 million, LeBlanc persuaded the board to spend an additional $4 million on TV ads, starting in January 2010. By October 2010, the deficit had turned into an $11 million surplus. Since then, enrollment has shot up by 125,000 students in the space of eight years.

But being an online powerhouse isn’t enough to satisfy LeBlanc’s ambitions. Worried about the value of an online bachelor’s degree, he is looking to change the nature of the product SNHU is selling. He’s pursuing two experiments, both controversial in higher ed circles. The first, competency-based education, or CBE, offers an online degree for less money in an abbreviated time frame. The second, micro-credentials, gives students the chance to earn a certificate, rather than a degree, in months rather than years. Coding boot camps have already proved that at least certain types of employers like micro-credentials and that
graduates can hike their earning potential by tens of thousands of dollars. “I think we have to move away from a one-size-fits-all model of education and give people choices,” he says.

CBE is a bit more radical. The theory is that many employers prefer to see a list of competencies, or tasks, that graduates can perform, rather than grades of A, B or C in a list of courses. In 2012, SNHU launched its online College for America CBE program with a $1 million grant from the Bill & Melinda Gates Foundation. Unlike SNHU’s standard eight-week online courses, CBE offerings run for six months. They have online course materials like readings and videos but no formal instruction or short-term assignments. Instead students work independently on projects that demonstrate their mastery of a competency like “create and deliver a sales presentation” in a marketing course. When the student finishes the project, an adjunct professor evaluates it. If the student passes, she has no interaction with the adjunct. If she comes up short, the adjunct steps in to help.

SNHU charges $2,500 for each six-month CBE session, during which students can take as many courses as they want. CBE course fees are low because adjuncts earn just $30 an hour and get paid only when students need them. Many College for America students race through a bachelor’s degree in four sessions at a total cost of $10,000.

The College for America is especially relevant for working adults, LeBlanc says, since a student who has been a self-taught bookkeeper in a family business for a decade can ace a CBE accounting course without studying, thus earning college credit for accumulated knowledge.

LeBlanc’s first CBE customers were employers who wanted to offer free college to their workers, at low cost to the companies. Indianapolis-based insurance giant Anthem, one of SNHU’s initial corporate partners, has paid for 450 employees to earn either associate’s or bachelor’s degrees since it launched its SNHU program in 2015 and 1,000 employees are currently enrolled. In less than five years, SNHU has signed up 120 corporate customers.
SNHU runs an online competency-based education program that serves a total of 1,000 refugees in Rwanda, Malawi, Kenya, Lebanon and South Africa. The goal: educate 50,000 in 20 locations by 2025.

But CBE and micro-credentials have come under attack from multiple fronts. Salt Lake City-based Western Governors University, an online mega-school that offers only CBE courses to its 115,000 students, was targeted by the Inspector General at the Department of Education in 2017 because it didn’t offer sufficient faculty-student interaction to satisfy federal rules that apply to distance education. WGU risked having to repay $712 million in federal funds. (Earlier this year, the government rejected the Inspector General’s recommendation.)

More broadly, critics like Johann Neem, a history professor at Western Washington University and the author of the forthcoming book *What’s the Point of College: Seeking Purpose in an Age of Reform*, says a CBE degree is the equivalent of a “second tier” credential that deprives first generation and low-income students of the kind of in-depth intellectual exploration of multiple subjects, from philosophy to art history, that a college education should provide. “Southern New Hampshire’s College for America is deeply insulting to adult students,” he says. “CBE takes one aspect of what we do as professors, which is assessment, and ignores all the other important things we do,” he says. “It’s reductive.”

“He has a very romanticized version of what’s happening on his and other campuses,” LeBlanc says. “His criticism is a kind of elitism that fails to recognize the huge swath of America that is not being served by the model he valorizes.”

As much as LeBlanc preaches about SNHU’s ability to bring a college education to nontraditional students, his own two daughters have taken a traditional route to prestigious degrees. Both earned their bachelor’s at Brown. One is finishing a doctorate in the history of science and technology at Stanford and is planning to pursue an academic career. The other became a Rhodes Scholar, got a master’s and a doctorate in anthropology at Oxford and is set to apply to top-tier law schools.

What connection, if any, does LeBlanc see between the education for the masses he’s offering at SNHU and the expensive, high-status degrees his own children have pursued? “With the best of the education I was able to get, I changed the trajectory of my kids’ lives,” he says. “I don’t see their path as at odds with what I’m doing. When a student can come to SNHU and unlock opportunities for a better job, then they can open a better path for their family. That’s the classic American dream, and it’s slipped out of reach for too many Americans.”

A number of individuals contributed to the project.

Carol B. Aslanian led the Aslanian Market Research team, which included Steven Fischer.

Dr. David L. Clinefelter led the Learning House team, which included Andrew J. Magda, Wendy Parrish, Shandi Thompson, Katie Savinon, Will Bell, Amy Elswick, Rachel Green, Jackie Hack, Joseph Enderle, and Betty Cesarano.

# Table of Contents

## Introduction
- Preface .......................................................... 5
- Key Findings ..................................................... 7
- Emerging Trends to Watch ........................................ 10

## Section 1: What Online Students Choose to Study
- Type of Program .................................................. 11
- Program of Study .................................................. 12
- Prior College Experience ........................................ 13
  - Undergraduate Students ........................................ 13
  - Graduate Students .............................................. 16
- Time and Motivation ............................................ 17

## Section 2: The Online College Student’s Decision-Making Process
- Staying Local ...................................................... 19
- Field of Study Matters More Than Modality ................. 20
- Number of Schools Considered ................................. 22
- Most Important Factors in the Decision-Making Process ... 23
- Influential Factors ................................................ 25
- Application Timeline ............................................ 26

## Section 3: Financing Education for the Online College Student
- Price Versus Other Factors ..................................... 27
- The Influence of Financial Incentives ......................... 28
- Hurdles in the Enrollment Process .............................. 29
- Tuition Reimbursement ......................................... 30
## TABLE OF CONTENTS

Online College Students 2019: Comprehensive Data on Demands and Preferences

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>SECTION 4: THE ONLINE COLLEGE STUDENT IN THE CLASSROOM</td>
<td>32</td>
</tr>
<tr>
<td>Using Mobile Devices for Online Education</td>
<td>32</td>
</tr>
<tr>
<td>Soft Skills Development</td>
<td>36</td>
</tr>
<tr>
<td>Career Services</td>
<td>38</td>
</tr>
<tr>
<td>Support Services</td>
<td>41</td>
</tr>
<tr>
<td>Learning Outcomes</td>
<td>44</td>
</tr>
<tr>
<td>SECTION 5: THE IMPACT OF ONLINE PROGRAMS</td>
<td>46</td>
</tr>
<tr>
<td>Post-Graduation Support &amp; Engagement</td>
<td>46</td>
</tr>
<tr>
<td>The Perceived Value of Online Learning</td>
<td>48</td>
</tr>
<tr>
<td>Online Versus In-Person Instruction</td>
<td>49</td>
</tr>
<tr>
<td>APPENDIX: DEMOGRAPHICS</td>
<td>50</td>
</tr>
<tr>
<td>Evolving Demographics</td>
<td>50</td>
</tr>
<tr>
<td>Earning a Living</td>
<td>53</td>
</tr>
<tr>
<td>METHODOLOGY</td>
<td>55</td>
</tr>
<tr>
<td>REFERENCES</td>
<td>57</td>
</tr>
<tr>
<td>References</td>
<td>57</td>
</tr>
<tr>
<td>Partners</td>
<td>58</td>
</tr>
<tr>
<td>Authors</td>
<td>59</td>
</tr>
</tbody>
</table>
INTRODUCTION

PREFACE

In 2006, a rule that restricted colleges and universities from offering more than 50% of their courses online was eliminated from the Higher Education Act. For-profit and adult-focused public universities swiftly launched online programs that proved popular among adult learners who wanted a flexible program that fit their busy lives. These pioneering schools were soon followed by entrepreneurial nonprofit colleges and universities, often seeking to reverse stagnant or declining enrollments. Their strategy for introducing online programs was simple: “If you build it, they will come.” Students came to these programs in droves.

Once online programs proved profitable, a wave of schools entered the market. By 2016, only 10 years after the 50% rule was eliminated, 32% of college students took at least one online course, and 17% were enrolled in fully online programs (NCES, 2016). At that time, 72% of public and 50% of private, nonprofit schools offered fully online programs (Xu & Xu, 2019). With better-known brands, they captured market share from for-profit schools, forcing many to close or merge.

What’s next? Does the online market have room for schools that have stayed on the sidelines? How can schools develop new online programs that students find meaningful? What strategies and practices will help schools thrive? The purpose of the Online College Students report is to answer these questions, provide guidance to school leaders, and help them retain students through to graduation.
This is the eighth edition of the *Online College Students* report. Learning House, a Wiley brand, and Aslanian Market Research, a division of EducationDynamics, have produced this research since 2012 to document the preferences and behaviors of students enrolled in fully online programs.

To develop this report, Learning House and Aslanian Market Research surveyed 1,500 prospective, current, and recently graduated fully online college students. The survey that underpins this annual report has evolved over time. To document trends, certain questions are asked every year, while questions that receive consistent responses are replaced with new questions to identify significant shifts in preferences and behavior.

While this report notes comparisons with past data where significant, readers are encouraged to review the seven previous editions of *Online College Students* for more information. To access those reports, visit [www.learninghouse.com/research](http://www.learninghouse.com/research) and [www.educationdynamics.com/e-books](http://www.educationdynamics.com/e-books).

Recommendations for online programs based on survey findings and current best practices are presented in *bold, italicized text within colored boxes* at the end of selected sections.
KEY FINDINGS

Below is a summary of key findings within the report.

1. **Online Students Believe They Acquire the Soft Skills That Employers Desire**

   Only one-third to one-half of respondents say their school taught soft skills that employers value, such as writing and critical thinking. Even so, more than 60% reported that their online education helped them improve these skills. Critical thinking and problem-solving (85%) were the most improved skills cited, while teamwork (69%) and oral communication (62%) were the least improved.

2. **A Significant Proportion of Online Students Want a Lifelong Relationship With Their School**

   More than 40% of current online students and graduates plan to return to their alma mater to take additional classes. Beyond opportunities to become a lifelong learner as an alum, about one-third of students say they would recommend their school to prospective students, about one-fifth joined or plan to join their alumni association, and 13% plan to donate to their school after graduation.

3. **Most Students Use Mobile Devices to Complete Coursework**

   Fifty-six percent of current and past online college students use a smartphone or tablet to complete at least some of their online course-related activities, while two-thirds of prospective online college students want to use a mobile device to complete coursework. Despite this demand, 17% of respondents indicated that their program did not support mobile access. Additionally, students 45 and older are significantly less likely to use or want to use a mobile device for coursework, highlighting a generational difference.
4. **The Online Population Is Complex**

The complex online student population includes learners from multiple generations and segments. About half of online college students are millennials (ages 28 to 38), about one-third are from Generation X (ages 39 to 54), and the remainder is split between baby boomers (ages 55 to 73) and Gen Zers (ages 18 to 22) (Fry & Parker, 2018). One-third of online college students are first-generation college students, and 13% have no prior college experience. Of online students with past college experience, about one-third are returning after a break of five or more years. A single class may include students from each of these age groups, which creates a complex mix of preferences and behaviors among classmates.

5. **Distance From Home to Campus Continues to Shrink**

When this study was first conducted in 2012, 44% of online college students chose a school within 50 miles of their residence. However, in 2019, 67% of online college students are enrolling at schools within 50 miles of their residence, and 44% of those students live within 25 miles of their school.

6. **Career Services Are Popular, Especially Among First-Generation Students**

Online students use the full gamut of career services during and after their enrollment. Only about one-quarter to one-third report not using career services. However, this study found that students who are first in their family to pursue higher education are more likely to use career services. For instance, first-generation online college students are statistically more likely to seek internship search help (70% vs. 59%), attend a school-sponsored job fair (66% vs. 55%), or attend an alumni networking event (67% vs. 57%) when compared to non-first-generation students.
7. **Support Services Are Desirable**

   About one-fourth of current online students reported that they use school support services such as child care, financial management, and mental health services. A similar percentage indicated they do not use these services, and the remaining 50% indicated they would use these services if available.

8. **School Selection Is Most Influenced by Third-Party Resources**

   The three most influential sources in the school selection process are online reviews (35%), college search/ranking websites (33%), and friends or family (30%). Various forms of direct advertising are considerably less influential. In a related question for this and past surveys, reputation of the school and/or program consistently appears as one of the top two factors for selecting a school.

9. **The Need for Convenience Is Growing**

   The majority of online college students at the undergraduate (51%) and graduate (70%) levels are employed full time, and 41% of all online students are parents. In recent years, slightly more than 60% of online students were enrolled full time, which jumped to 71% this year. According to U.S. Department of Education guidelines, a typical full-time student needs to dedicate about 30 hours per week to their studies, which is a substantial time commitment for full-time workers. This demonstrates why one-third of students are willing to pay higher tuition for a program that offers more convenience in regard to scheduling and format.

10. **Cost Continues to Be a Key Factor**

    Affordability is the top factor for students who are choosing an undergraduate program. For graduate students, affordability ties with reputation as the top factor. One-third of all students chose the least expensive school, and 20% said that figuring out how to pay tuition was the hardest part of enrolling in a program. For many students, receiving a relatively small incentive – like a free course – can influence their decision-making process.
EMERGING TRENDS TO WATCH

This study identified three trends emerging in online education. First, an increased number of undergraduate students enrolled in arts and humanities programs and STEM programs. While the five percent enrollment increase in these programs is not statistically significant, it warrants observation.

Second, the share of male students in the survey population increased 10 percentage points this year. This may be a sampling anomaly or the result of growing interest among men in computers and IT programs and STEM programs, as interest increased this year for these male-dominated fields.

The third potential trend is an expected increase in online Hispanic students. The high school- and college-age Hispanic population in the United States is rapidly growing, and so are Hispanic high school graduation and college attendance rates (Fry & Parker, 2018). Despite rising college attendance, the percentage of Hispanics enrolled in online programs has held steady since 2012 at about 10%. This may stem from only 46% of Hispanics having access to broadband internet at home, while use of mobile devices is more common (Brown, López, & Lopez, 2016). As the percentage of college students who are Hispanic rises and access to broadband increases, online enrollments should follow suit.
SECTION 1:
WHAT ONLINE STUDENTS CHOOSE TO STUDY

TYPE OF PROGRAM

Although most online college students enroll in degree programs, 19% of respondents are interested in or enrolled in online certificate or licensure programs. Interest in certificate or licensure programs was more common for graduate students (23%) than undergraduates (16%).

**RECOMMENDATION:**
Many undergraduate students enroll in certificate/licensure programs to earn a credential for an entry-level position. A cost-effective strategy for serving these students is to package three to five existing programs into a certificate that offers specific job knowledge or skills.
PROGRAM OF STUDY

As online learning matures, the industry is seeing a proliferation of online providers and the introduction of specialized programs. This is slicing the program pie into smaller pieces, as legacy programs lose students to niche fields of study.

<table>
<thead>
<tr>
<th>Program of Study</th>
<th>Undergraduate</th>
<th>Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>26%</td>
<td>30%</td>
</tr>
<tr>
<td>Health &amp; Medicine</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Computers &amp; IT</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Social Sciences, Criminal Justice, Law</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Arts &amp; Humanities</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Education &amp; Teaching</td>
<td>6%</td>
<td>11%</td>
</tr>
<tr>
<td>Science, Technology, Engineering, or Mathematics</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Counseling, Human Services</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

At the graduate level, interest in computer and IT programs — which this study analyzed separately from other STEM fields — grew from nine percent in 2014 to 19% in 2019. There is a corresponding contraction in education and teaching programs, where interest plunged from 22% in 2014 to 11% in 2019.
Interest in online STEM programs at the undergraduate level increased from six percent in 2014 to 11% in 2019. Online enrollment in undergraduate arts and humanities programs also claimed modest gains, likely due to growing interest in communication and liberal arts degrees. However, growth in undergraduate STEM programs and arts and humanities programs are within this study’s margin of error. Online business, health and medicine, and education programs also sustained slight declines.

Men are about three times more likely than women to choose a STEM field or computers and IT program, according to the 2019 data. More men participated in the 2019 survey than in previous years, which could contribute to increased interest in these fields. Women are about three times more likely than men to choose health and medical fields, which are fields that declined in this year’s survey.

**RECOMMENDATION:**

*Schools should not abandon legacy programs despite stagnating enrollments. Instead, they should identify unique features of their legacy programs to differentiate from options offered by other schools, such as cost or career services offered. At the same time, schools should analyze niche programs to assess how their institutional strengths match those specialized fields. There is less competition in some of these specialized areas, but students likely want to enroll in an online program that has a strong reputation in that field.*

**PRIOR COLLEGE EXPERIENCE**

*Undergraduate Students*

Most respondents (87%) had transfer credits when they began their latest undergraduate online program. In fact, more than one-quarter (28%) had credits that equal or exceed what is required for an associate degree.

Forty-five percent of undergraduate students were previously enrolled in college within the past two years, and one in five were enrolled five or more years ago. In addition, 13% of current undergraduate students had never taken college classes before. This segment of beginners is represented by students of multiple generations.

Of the undergraduate respondents with prior college experience, 55% earned all past credits from one school. About half (51%) earned credits through a mix of online and face-to-face courses, and 15% earned all past credits in fully online courses.
How long has it been since you were last enrolled in undergraduate study?

- Never: 16%
- Less than one year: 16%
- 1 year: 15%
- 2 years: 14%
- 3 years: 11%
- 4 years: 5%
- 5 or more years: 24%

How many undergraduate credits had you accumulated prior to enrolling in your most recent fully online program?

- None: 13%
- 1-15: 21%
- 16-30: 22%
- 31-59: 15%
- 60-90: 15%
- More than 90 credits: 13%
At how many institutions have you previously earned undergraduate credit?

- 55% One
- 32% Two
- 9% Three
- 4% Four or more

How were those credits earned?

- 51% Online courses only
- 34% Classroom courses only
- 15% Both classroom and online courses
**Graduate Students**

At the graduate level, 39% of online students were enrolled in an undergraduate program within the last two years. A near equal number (37%) were previously enrolled five or more years ago.

### How long has it been since you were last enrolled in undergraduate study?

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>10%</td>
</tr>
<tr>
<td>1 year</td>
<td>15%</td>
</tr>
<tr>
<td>2 years</td>
<td>14%</td>
</tr>
<tr>
<td>3 years</td>
<td>11%</td>
</tr>
<tr>
<td>4 years</td>
<td>12%</td>
</tr>
<tr>
<td>5 or more years</td>
<td>37%</td>
</tr>
</tbody>
</table>

**RECOMMENDATION:**

The education history of online college students varies considerably, which presents opportunities and potential stumbling blocks for schools. Advisors should tailor their guidance to a learner’s experience, and schools should provide support services that target students of different backgrounds, such as intensive advising for first-generation students and technical support for older students without online experience.
TIME AND MOTIVATION

Seventy-one percent of respondents attend school full time. This falls in line with historic data showing online learners want to graduate as soon as possible. With 59% working full time and 18% working part time, students must juggle their job responsibilities with heavy class loads.

Are you enrolled full or part time?

- 71% Full time
- 23% Part time
- 6% Not sure

RECOMMENDATION:

Online students tend to have full schedules, so anything a school can do to help students save time is beneficial. This includes simplifying the enrollment process by acquiring transcripts on behalf of transfer students and offering to help students complete financial aid forms. To aid current students, schools can provide audio versions of textbooks and reading assignments that students can listen to during their daily commute. In addition, using a mobile-accessible learning management system (LMS) enables students to participate in discussion forums and complete assignments via smartphone or tablet during short periods of downtime. Finally, back-to-back scheduling of courses across 12 months promotes timely completion.
Ninety-three percent of online college students join a program to fulfill career aspirations. Fifty-three percent enroll in an online program with the goal of starting a new career, and 18% are preparing for their first professional job. These goals are particularly common for undergraduates, while graduate students tend to pursue promotions and higher salaries.
SECTION 2:
THE ONLINE COLLEGE STUDENT’S DECISION-MAKING PROCESS

STAYING LOCAL

Though online learning allows students to attend classes anywhere they have internet access, a growing majority of online students are choosing a nearby school. Since the first edition of this report in 2012, the distance between a student’s home and school has steadily contracted. During the past five years, the number of online students choosing a school within 50 miles of home grew from 42% to 67%. At the same time, the portion of students choosing a school more than 100 miles from home fell from 37% to 15%.

How far do you live from the closest campus/service center of the college/university in which you enrolled?

- 50 miles or less
- 25 miles or less
- 26 to 50 miles
- 51 to 100 miles
- More than 100 miles
- 101 to 250 miles
- More than 250 miles
- Not sure
RECOMMENDATION:

The growing number of schools offering online programs provides students with more options closer to their home. Local schools have greater visibility among employers and others in the community, which is valuable to students. Data indicates that many students would like to visit campus and schools should engage this group by inviting them to campus events such as meetings with faculty and staff or extracurricular activities.

FIELD OF STUDY MATTERS MORE THAN MODALITY

The majority of online college students (58%) identified their desired field of study before they decided to study online. The flexibility of online learning is one of its major draws, as 63% of students said the modality works best for their responsibilities. In addition, 63% of respondents would have enrolled in on-campus classes if their field of study wasn’t offered online. This demonstrates the appeal of online programs, as most have an on-campus counterpart that students could have chosen. When students answered this question in 2013 and 2014, only 30% would have attended an on-campus program if studying online was not an option.

What did you decide first?

- 58% Your field of study
- 42% To study online
What drove your decision to study online?

- 63%: It works best for my current work/life responsibilities
- 34%: It is my preferred way to learn
- 3%: I could only find my study area of interest online

If the program you wanted was not available in an online format, how likely is it that you would have enrolled in a classroom program?

12% Definitely not
21% Definitely not
36% Definitely
27% Definitely
NUMBER OF SCHOOLS CONSIDERED

Before students apply to an online program, 60% contact two or three schools for information. On average, students contact 2.47 schools, with graduate students averaging 2.61 contacts compared to 2.37 for undergraduates. In the past five years, the percentage of students who only contacted one school declined from 33% to 23%. This indicates students are doing more research before they apply.

How many schools did you contact or request information from about online programs?

<table>
<thead>
<tr>
<th></th>
<th>One</th>
<th>Two</th>
<th>Three</th>
<th>Four</th>
<th>Five or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>All students</td>
<td>23%</td>
<td>31%</td>
<td>29%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>28%</td>
<td>31%</td>
<td>26%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Graduate</td>
<td>17%</td>
<td>32%</td>
<td>34%</td>
<td>7%</td>
<td>10%</td>
</tr>
</tbody>
</table>

RECOMMENDATION:

One-quarter of online college students reach out to only one school, which makes the first contact a precious resource. Enrollment teams must rapidly respond to students, and school websites should feature comprehensive, easy-to-find information. Past surveys found that students want to review details about financial aid and transfer credits before they apply. Therefore, schools should make this information readily available on their website. Websites should also deliver an optimal user experience and provide an easy way for students to contact the school via their preferred communication method.
MOST IMPORTANT FACTORS IN THE DECISION-MAKING PROCESS

Since 2015, cost has been the top factor in the online college student’s decision-making process. This year, 60% of undergraduates selected affordability as a top three factor, as did 46% of graduate students. Although reputation is the second most important factor, it lags far behind affordability for undergraduate students. However, graduate students rank reputation (39%) and affordability (46%) relatively close. In addition, the quality of faculty is significantly more important to graduate students than undergraduate students (34% vs. 20%). Factors ranking in the top three for more than one-quarter of online college students include whether the program offered the quickest path to a degree (this may be due to transfer credits or accelerated courses or year-round study) and the ability to switch between online and face-to-face courses.
### What are the most important factors in your decision about which school to choose for an online program? (Select top 3)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Undergraduate</th>
<th>Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordability</td>
<td>60%</td>
<td>46%</td>
</tr>
<tr>
<td>Reputation of the school/program</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>Offered quickest path to a degree</td>
<td>31%</td>
<td>29%</td>
</tr>
<tr>
<td>I can take both online and on-campus courses during my program</td>
<td>28%</td>
<td>24%</td>
</tr>
<tr>
<td>Proximity to where I live or work</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Had favorable admissions requirements</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Quality of faculty</td>
<td>20%</td>
<td>34%</td>
</tr>
<tr>
<td>The school’s mission/values align with my values</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Positive interactions with staff during search process</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Familiarity with the school</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Recommendation from people I respect</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Alumni achievements</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>My employer had a relationship with the school</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Something else</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

### RECOMMENDATION:

Cost is critical. Half of online college students include affordability in their top three factors for selecting a school. In addition, one in five say that determining how to pay for school is the hardest part of the enrollment process. Therefore, if a school is not the least expensive provider in its market, it should promote its value proposition to show added benefits that validate higher costs. Another option is to find ways to reduce the total cost of a program outside of tuition.
INFLUENTIAL FACTORS

When online college students consider which school to attend, they are mostly influenced by online reviews (35%), college search/ranking websites (33%), and recommendations of friends or family (30%). Fewer students are most influenced by paid marketing initiatives, such as direct mail (12%), email (11%), TV spots (10%), and Google advertising (10%). Five percent of respondents say that something else influenced their decision, with many reiterating that their decision boiled down to affordability.

### What was most influential in selecting a school? (Select up to three)

<table>
<thead>
<tr>
<th>Option</th>
<th>All students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online reviews</td>
<td>35%</td>
</tr>
<tr>
<td>College search/ranking websites (eLearners.com, ClassesUSA.com, U.S. News &amp; World Report, etc.)</td>
<td>33%</td>
</tr>
<tr>
<td>Recommendations of friends or family</td>
<td>30%</td>
</tr>
<tr>
<td>College fair or event</td>
<td>14%</td>
</tr>
<tr>
<td>Community college I attended</td>
<td>12%</td>
</tr>
<tr>
<td>Direct mail from the school</td>
<td>12%</td>
</tr>
<tr>
<td>Emails from the school</td>
<td>11%</td>
</tr>
<tr>
<td>TV commercials about the school</td>
<td>10%</td>
</tr>
<tr>
<td>Online advertisements on Google</td>
<td>10%</td>
</tr>
<tr>
<td>Online advertisements on social media (Facebook, YouTube, Instagram, etc.)</td>
<td>10%</td>
</tr>
<tr>
<td>People or groups I follow online</td>
<td>9%</td>
</tr>
<tr>
<td>My employer</td>
<td>8%</td>
</tr>
<tr>
<td>Radio commercials about the school</td>
<td>2%</td>
</tr>
<tr>
<td>Something else</td>
<td>5%</td>
</tr>
</tbody>
</table>
RECOMMENDATION:

*Schools must monitor the numerous websites and publications that review and rank colleges, as students value this information. Generally, schools should place a premium on all third-party recommendations, as students find them much more influential than paid advertising.*

APPLICATION TIMELINE

Most online college students complete an application for an online program within two months of starting their search process. However, many students are taking longer to decide than in previous years, as the portion of students who apply within two weeks declined from 38% in 2016 to 25% in 2019. Even so, 59% of students apply to at least one school within four weeks. Graduate students usually take longer to apply, as only 51% apply within one month of starting their search, compared to 64% of undergraduates.

How long did it take you from the time you first started your search for an online program to completing your first application?

<table>
<thead>
<tr>
<th>Duration</th>
<th>2019</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 2 weeks</td>
<td>25%</td>
<td>38%</td>
</tr>
<tr>
<td>2-4 weeks</td>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td>5-8 weeks</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>9-12 weeks</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>3 months or longer</td>
<td>10%</td>
<td>8%</td>
</tr>
</tbody>
</table>
SECTION 3:
FINANCING EDUCATION FOR THE ONLINE COLLEGE STUDENT

PRICE VERSUS OTHER FACTORS

While online college students emphasize affordability, other factors could spur them to pay more for tuition. Possibilities include convenience, preferred programmatic content, and reputation.

In 2017, 74% of respondents said they would select a more expensive program if it offered more convenience, preferred programmatic content, or a strong reputation. This year, only 67% of respondents answered this way. Convenience (36%) now matters more than content (16%) and reputation (15%), with one-third of students defaulting to the program with the lowest tuition.

Which statement about tuition is the closest to how you made your enrollment decision?

- 36% Tuition for my preferred program is the lowest among the programs I evaluated.
- 33% Tuition for my preferred program is higher than some others but the program’s convenience and its format, schedule and location are ideal for me.
- 16% Tuition for my preferred program is higher than some, but the content is what I want.
- 15% The school and the program I chose/will choose has the best reputation.

FINANCING EDUCATION FOR THE ONLINE COLLEGE STUDENT
Online College Students 2019: Comprehensive Data on Demands and Preferences
THE INFLUENCE OF FINANCIAL INCENTIVES

“Free” items like textbooks, courses, scholarships, and payment programs are attractive to cost-conscious students. Between 85% and 90% of respondents said these options would “somewhat” or “very much” impact their decision to enroll. However, payment plans are less enticing than free textbooks and scholarships.

To what extent would each of the following be likely to impact your decision to choose one online program over another?

- Textbooks are free: 10% Not at all, 25% Somewhat, 65% Very much
- $500 annual scholarship: 10% Not at all, 33% Somewhat, 58% Very much
- First course is free: 15% Not at all, 33% Somewhat, 52% Very much
- Monthly payment plan: 14% Not at all, 40% Somewhat, 46% Very much
- Quarterly payment plan: 15% Not at all, 42% Somewhat, 42% Very much

RECOMMENDATION:

Affordability is so important to online college students that inexpensive incentives can influence enrollment decisions. Cost-effective options include payment plans or using open education resources (OER) to negate textbook fees. Additionally, small scholarships (about $500) or free courses could attract additional enrollees. Typically, the lifetime value of an enrollee far exceeds the costs of these initiatives. As such, school leaders should consider offering each of these cost-effective incentives to net more students.
HURDLES IN THE ENROLLMENT PROCESS

Undergraduates are more likely than graduate students to struggle to complete financial aid forms. This may be because graduate students acclimate to the enrollment process when they earn their undergraduate degree. Another explanation may be that fewer graduate students rely on financial aid to pay tuition. Determining how to pay for an online program can be an obstacle for undergraduate (21%) and graduate students (17%) alike. Also, 10% or more of all online students struggle to gather transcripts and transfer past credits to a new program.

<table>
<thead>
<tr>
<th>What was the most difficult part of the enrollment process?</th>
<th>Undergraduate</th>
<th>Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completing financial aid forms</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>Determining how to pay for school</td>
<td>21%</td>
<td>17%</td>
</tr>
<tr>
<td>Gathering transcripts</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Transferring previous credits</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Writing essays</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Scheduling/registering for courses</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Completing the application</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Understanding the enrollment process</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Gathering recommendations</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Something else</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

SECTION 3: FINANCING EDUCATION FOR THE ONLINE COLLEGE STUDENT
Online College Students 2019: Comprehensive Data on Demands and Preferences
**RECOMMENDATION:**

Although online college students now take slightly longer to apply than in past years, most students select a school relatively quickly. To efficiently serve this eager population, schools must be highly responsive to student needs and do as much as possible to streamline the admission process. This includes assisting with tasks that some students find difficult, such as completing financial aid forms, collecting transcripts, and fulfilling transfer credit requirements.

**TUITION REIMBURSEMENT**

About one-third of online college students are reimbursed tuition by their employer while 40% of respondents said their employer offers such a benefit. Of all respondents who had this benefit, 85% took advantage of it. Twenty-eight percent of online graduate students say their employer and school partner to offer discounted tuition, but these discounts are available to only 17% of undergraduates.

**Did you use employer tuition reimbursement? [Employed full or part-time]**

**Undergraduate students**

- Yes: 30%
- No: 62%
- Benefit not offered: 8%

**Graduate students**

- Yes: 39%
- No: 57%
- Benefit not offered: 4%
**Does your school offer tuition discounts for employees at your company? [Employed full or part-time]**

<table>
<thead>
<tr>
<th></th>
<th>Undergraduate</th>
<th>Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>17%</td>
<td>28%</td>
</tr>
<tr>
<td>No</td>
<td>57%</td>
<td>54%</td>
</tr>
<tr>
<td>Unsure</td>
<td>27%</td>
<td>19%</td>
</tr>
</tbody>
</table>

**RECOMMENDATION:**

Partnering with businesses to offer tuition discounts to employees can be an effective recruiting tool. Moreover, online alumni can be an effective resource for establishing these partnerships. Nearly half of online college students intend to take classes after graduation, and one-third plan to refer potential students to their alma mater and/or join their alumni association. These extended relationships can help schools form partnerships with companies that employ their alumni.
SECTION 4:
THE ONLINE COLLEGE STUDENT IN THE CLASSROOM

USING MOBILE DEVICES FOR ONLINE EDUCATION

The majority of online college students are using or want to use mobile devices to access online classrooms and complete activities. Fifty-six percent of online college students use a smartphone or tablet to complete at least some of their online course-related activities. Graduate students (63%) are significantly more likely than undergraduates (52%) to use a mobile device in conjunction with online courses. An additional 17% of current or past online students would have liked the option to complete activities using a mobile device. These preferences are comparable to what prospective online college students reported, as 66% would like to complete at least some course-related activities on a mobile device.

There is a clear demarcation between younger and older students regarding mobile use. About 60% of students age 45 and younger use a mobile device for some or all online coursework, but only 27% of students 46 and older agree.

![Chart showing mobile device usage by age group](chart.jpg)

**Did you complete any online course-related activities using your mobile device (phone/tablet)?**

- 25 and younger: 26% Yes, most of my course-related activities, 32% Yes, some of my course-related activities, 17% No, but I would have liked to, 25% No, and I would not want to
- 26 to 45: 32% Yes, most of my course-related activities, 27% Yes, some of my course-related activities, 16% No, but I would have liked to, 26% No, and I would not want to
- 46 and older: 13% Yes, most of my course-related activities, 14% Yes, some of my course-related activities, 22% No, but I would have liked to, 51% No, and I would not want to
Would you want to complete any online course-related activities using your mobile device (phone/tablet)?

- 46% Yes, most of my course-related activities
- 20% Yes, some of my course-related activities
- 34% No, and I would not want to

**RECOMMENDATION:**

There is a strong division between students who want to use mobile devices for class activities and those who do not. A red flag is that 17% of current students would like to use a mobile device but do not, likely because their school uses a learning management system (LMS) that is not mobile-friendly. To meet the needs of students, schools without a mobile-friendly website and LMS should modernize their systems soon.
Checking grades, due dates, and schedules is the top reason current and past students (68%) use their mobile device for online courses. And 74% of prospective students would use their mobile device for the same purpose. Prospective students also want to use mobile devices to communicate with professors (55%) and other students (50%). Other top reasons that current and past students used mobile devices include completing course-related readings (44%) and watching videos (36%).

<table>
<thead>
<tr>
<th>During your online studies, when did you use a mobile device (a phone/tablet but not a laptop)? (Select all that apply)</th>
<th>Current and past students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking grades, assignment due dates, or course schedules</td>
<td>68%</td>
</tr>
<tr>
<td>Completing digital readings</td>
<td>44%</td>
</tr>
<tr>
<td>Completing videos or other multimedia learning</td>
<td>36%</td>
</tr>
<tr>
<td>Communicating with professors</td>
<td>35%</td>
</tr>
<tr>
<td>Researching additional information</td>
<td>32%</td>
</tr>
<tr>
<td>Completing practice activities</td>
<td>28%</td>
</tr>
<tr>
<td>Communicating with other students</td>
<td>26%</td>
</tr>
<tr>
<td>Completing graded activities</td>
<td>24%</td>
</tr>
<tr>
<td>Participating in a discussion forum</td>
<td>24%</td>
</tr>
<tr>
<td>Something else (please specify)</td>
<td>0%</td>
</tr>
</tbody>
</table>
During your online studies, when would you want to use a mobile device (a phone/tablet but not a laptop)? (Select all that apply)  

<table>
<thead>
<tr>
<th>Activity</th>
<th>Prospective students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking grades, assignment due dates, or course schedules</td>
<td>74%</td>
</tr>
<tr>
<td>Communicating with professors</td>
<td>55%</td>
</tr>
<tr>
<td>Communicating with other students</td>
<td>50%</td>
</tr>
<tr>
<td>Completing videos or other multimedia learning</td>
<td>40%</td>
</tr>
<tr>
<td>Completing digital readings</td>
<td>39%</td>
</tr>
<tr>
<td>Completing practice activities</td>
<td>37%</td>
</tr>
<tr>
<td>Researching additional information</td>
<td>35%</td>
</tr>
<tr>
<td>Participating in a discussion forum</td>
<td>30%</td>
</tr>
<tr>
<td>Completing graded activities</td>
<td>25%</td>
</tr>
</tbody>
</table>
SOFT SKILLS DEVELOPMENT

The survey asked students and recent graduates if their programs taught specific soft skills that employers value. Then the survey asked students if their skills in each area improved as a result of their online program. At 63%, critical thinking is the skill taught most often during online instruction. About half of students report learning writing skills, time management, and attention to detail. Slightly more than one-third of students learned teamwork and oral communication skills.

Although respondents report that many programs did not teach all skills, a majority of students say their skills improved as a result of their online education. About 85% agree that their program improved their attention to detail, time management, and critical thinking skills. An additional 79% say their writing skills improved. A lower percentage of students improved their teamwork (69%) and oral communication (62%) skills in their online program.

<table>
<thead>
<tr>
<th>Which skills did your online program teach you? (Select all that apply)</th>
<th>Past students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical thinking and problem-solving</td>
<td>63%</td>
</tr>
<tr>
<td>Writing skills</td>
<td>52%</td>
</tr>
<tr>
<td>Time management</td>
<td>51%</td>
</tr>
<tr>
<td>Attention to detail</td>
<td>49%</td>
</tr>
<tr>
<td>Teamwork skills</td>
<td>38%</td>
</tr>
<tr>
<td>Oral communication skills</td>
<td>36%</td>
</tr>
<tr>
<td>None of the above</td>
<td>3%</td>
</tr>
</tbody>
</table>
How strongly do you feel your online program improved these skills?  
[Current and past students]

<table>
<thead>
<tr>
<th>Skill</th>
<th>Disagree</th>
<th>Neither Agree nor Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical thinking and problem-solving</td>
<td>4%</td>
<td>12%</td>
<td>85%</td>
</tr>
<tr>
<td>Time management</td>
<td>4%</td>
<td>12%</td>
<td>84%</td>
</tr>
<tr>
<td>Attention to detail</td>
<td>3%</td>
<td>13%</td>
<td>84%</td>
</tr>
<tr>
<td>Writing skills</td>
<td>7%</td>
<td>15%</td>
<td>79%</td>
</tr>
<tr>
<td>Teamwork skills</td>
<td>11%</td>
<td>20%</td>
<td>69%</td>
</tr>
<tr>
<td>Oral communication skills</td>
<td>16%</td>
<td>22%</td>
<td>62%</td>
</tr>
</tbody>
</table>

**RECOMMENDATION:**

*Students can improve soft skills even if their online program doesn’t teach them overtly.*  
Instructional leaders can help students acquire these important skills by designing courses with lessons that teach skills directly. Course and lesson design should also identify why employers value these skills and demonstrate to students the importance of learning these skills. This knowledge could empower students who are seeking their first professional job, a career change, or a promotion.
CAREER SERVICES

Even though many online college students are employed full time, they still value and use career services. A large portion of respondents used or plan to use services listed in this survey if the services are offered by their school. In addition, this survey found that minority and first-generation students use these services more often.

The survey explored how respondents use 11 different career services. Résumé creation (23%) is the most popular service that past students used early in their academic career. For students nearing graduation, working with a career advisor (29%) is the most popular service. Throughout their time in school, self-assessments (28%), job search websites maintained by their school (25%), and job search guidance (24%) are used most. While usage of career services decreased after graduation, 10% or more of students are interested in help with internship placement, job interviews, job shadowing, career mentoring, and networking.
Which career services did you use, if any, during your most recent online program? [Past students]

<table>
<thead>
<tr>
<th>Career Service</th>
<th>First Semester</th>
<th>Second Semester</th>
<th>Close to Graduation</th>
<th>Throughout Studies</th>
<th>After Graduation</th>
<th>Not Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working with a career advisor</td>
<td>14%</td>
<td>29%</td>
<td>23%</td>
<td>7%</td>
<td>23%</td>
<td>4%</td>
</tr>
<tr>
<td>Job search website maintained by the school</td>
<td>13%</td>
<td>22%</td>
<td>25%</td>
<td>9%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>Self-assessments</td>
<td>16%</td>
<td>18%</td>
<td>28%</td>
<td>7%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>Guidance in how to conduct a job search</td>
<td>13%</td>
<td>24%</td>
<td>24%</td>
<td>9%</td>
<td>26%</td>
<td>5%</td>
</tr>
<tr>
<td>Resume creation</td>
<td>23%</td>
<td>22%</td>
<td>16%</td>
<td>8%</td>
<td>26%</td>
<td>5%</td>
</tr>
<tr>
<td>Guidance in how to conduct a search for an internship</td>
<td>13%</td>
<td>25%</td>
<td>20%</td>
<td>10%</td>
<td>28%</td>
<td>5%</td>
</tr>
<tr>
<td>Interview workshops</td>
<td>11%</td>
<td>24%</td>
<td>21%</td>
<td>10%</td>
<td>28%</td>
<td>7%</td>
</tr>
<tr>
<td>Career mentoring</td>
<td>13%</td>
<td>17%</td>
<td>21%</td>
<td>10%</td>
<td>30%</td>
<td>9%</td>
</tr>
<tr>
<td>Job shadowing</td>
<td>11%</td>
<td>20%</td>
<td>17%</td>
<td>11%</td>
<td>31%</td>
<td>10%</td>
</tr>
<tr>
<td>School-sponsored job fair</td>
<td>11%</td>
<td>20%</td>
<td>23%</td>
<td>8%</td>
<td>31%</td>
<td>7%</td>
</tr>
<tr>
<td>Alumni networking event</td>
<td>11%</td>
<td>19%</td>
<td>22%</td>
<td>10%</td>
<td>32%</td>
<td>6%</td>
</tr>
</tbody>
</table>

- Used during the first or second semester of my studies
- Used toward the end of my studies closer to graduation
- Used intermittently throughout my studies
- Use or plan to use after graduation
- Did not use
- Not offered by my school
Top career services that current online college students intermittently use include self-assessments (25%) and career advising (23%). Like graduates, 23% to 36% of current students do not use services listed in the survey.

Which career services do you use, if any, during your online program? [Current students]

<table>
<thead>
<tr>
<th>Service</th>
<th>1st or 2nd Semester</th>
<th>Close to Graduation</th>
<th>Intermittent</th>
<th>Plan to Use</th>
<th>Not Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working with a career advisor</td>
<td>17%</td>
<td>18%</td>
<td>23%</td>
<td>17%</td>
<td>23%</td>
</tr>
<tr>
<td>Job search website maintained by the school</td>
<td>11%</td>
<td>16%</td>
<td>19%</td>
<td>20%</td>
<td>28%</td>
</tr>
<tr>
<td>Self-assessments</td>
<td>12%</td>
<td>17%</td>
<td>25%</td>
<td>17%</td>
<td>25%</td>
</tr>
<tr>
<td>Guidance in how to conduct a job search</td>
<td>11%</td>
<td>15%</td>
<td>18%</td>
<td>19%</td>
<td>33%</td>
</tr>
<tr>
<td>Resume creation</td>
<td>16%</td>
<td>11%</td>
<td>18%</td>
<td>19%</td>
<td>31%</td>
</tr>
<tr>
<td>Guidance in how to conduct a search for an internship</td>
<td>11%</td>
<td>17%</td>
<td>18%</td>
<td>17%</td>
<td>32%</td>
</tr>
<tr>
<td>Interview workshops</td>
<td>10%</td>
<td>15%</td>
<td>15%</td>
<td>19%</td>
<td>35%</td>
</tr>
<tr>
<td>Career mentoring</td>
<td>7%</td>
<td>18%</td>
<td>21%</td>
<td>16%</td>
<td>31%</td>
</tr>
<tr>
<td>Job shadowing</td>
<td>8%</td>
<td>16%</td>
<td>19%</td>
<td>19%</td>
<td>31%</td>
</tr>
<tr>
<td>School-sponsored job fair</td>
<td>12%</td>
<td>15%</td>
<td>17%</td>
<td>15%</td>
<td>36%</td>
</tr>
<tr>
<td>Alumni networking event</td>
<td>9%</td>
<td>15%</td>
<td>14%</td>
<td>22%</td>
<td>36%</td>
</tr>
</tbody>
</table>

- Used during the first or second semester of my studies
- Used toward the end of my studies closer to graduation
- Used intermittently throughout my studies
- Use or plan to use after graduation
- Did not use
- Not offered by my school
RECOMMENDATION:

Although about one-third of online college students do not use career services, others use a variety while enrolled and after they graduate. First-generation and minority students use career services more often than others. As about one-quarter of online students are minority and one-third are first-generation students (proportions likely to increase over time), schools should communicate the availability of career services to these populations. About seven percent of students identified at least one career service that their school does not offer. In an increasingly competitive environment, such an oversight could place schools at a disadvantage.

SUPPORT SERVICES

Since career services are popular among students, this year’s survey was expanded to explore interest in other student support services offered by schools. Study skills development garnered the most interest, as 40% of current and past students used such a service. Time management (34%), money management (29%), and health/wellness assistance (28%) are the next most used support services.

At schools where services are not offered, at least 38% of current and past students would have used each service in the survey except for parenting skills/resources (29%) and child care services (25%). The majority of students are not interested in these two services, while about one-quarter have no interest in any services listed.

First-generation students are significantly more likely to use each of these services. For each service listed, except study skills development, first-generation students were 10% more likely to use the service than other students. Among prospective students, the largest areas of interest are money management (56%), study skills development (51%), time management assistance (46%), and health/wellness assistance (40%). Nearly 10% of prospective students are not interested in any services listed.
Which support services did you use, if offered, by the provider of your online program? [Current and past students]

<table>
<thead>
<tr>
<th>Service</th>
<th>Used</th>
<th>Would use if offered</th>
<th>Not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Study skills development</td>
<td>40%</td>
<td>38%</td>
<td>21%</td>
</tr>
<tr>
<td>Time management assistance</td>
<td>34%</td>
<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>Money management assistance</td>
<td>29%</td>
<td>47%</td>
<td>24%</td>
</tr>
<tr>
<td>Health/wellness assistance</td>
<td>28%</td>
<td>44%</td>
<td>28%</td>
</tr>
<tr>
<td>Mental health services</td>
<td>23%</td>
<td>42%</td>
<td>35%</td>
</tr>
<tr>
<td>Child care services</td>
<td>16%</td>
<td>25%</td>
<td>59%</td>
</tr>
<tr>
<td>Parenting skills/resources</td>
<td>15%</td>
<td>29%</td>
<td>56%</td>
</tr>
</tbody>
</table>
Which support services would you use, if offered, by the provider of your online program? (Select all that apply)

<table>
<thead>
<tr>
<th>Service</th>
<th>Prospective students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money management assistance</td>
<td>56%</td>
</tr>
<tr>
<td>Study skills development</td>
<td>51%</td>
</tr>
<tr>
<td>Time management assistance</td>
<td>46%</td>
</tr>
<tr>
<td>Health/wellness assistance</td>
<td>40%</td>
</tr>
<tr>
<td>Mental health services</td>
<td>31%</td>
</tr>
<tr>
<td>Child care services</td>
<td>16%</td>
</tr>
<tr>
<td>Parenting skills/resources</td>
<td>14%</td>
</tr>
<tr>
<td>Something else</td>
<td>0%</td>
</tr>
<tr>
<td>None of the above</td>
<td>9%</td>
</tr>
</tbody>
</table>

RECOMMENDATION:

Traditional thinking has been that online college students are adults who do not need the array of student support services provided to on-campus students. However, this survey found that online college students want a variety of support services. On average, one-quarter report using support services, and a significant percentage of respondents would use student support services if offered. By offering student support services to online learners, schools could gain a recruiting advantage, enhance the learning experience, and improve completion rates.
LEARNING OUTCOMES

Online students are positive about their classroom experience. Eighty-one percent of current and past students agree that their most recent course was compelling and interesting, and the same percentage feel their instructor presented materials effectively. A smaller majority (66%) report that discussion forums in their courses were engaging.

Recently, there has been a public debate about the value of a college education. In response, school leaders have taken steps to document the connection between a degree and meaningful employment. A 2017 survey explored this topic by asking 30,000 college students how well their school prepared them for the workforce (Gallup, 2017). Two of those questions appeared on the 2019 survey of online college students with similar results, as 75% of all college students in 2017 and 81% of online college students in 2019 affirmed they would graduate with the knowledge and skills to succeed in the workplace.

The 2017 Gallup survey also found that 63% of all college students said at least one professor, faculty, or staff member initiated a conversation about their career options. This is comparable to 71% of respondents to the 2019 Online College Students survey who answered the same way.

These conversations appear to have a positive impact. In the 2017 Gallup survey of all college students, 41% of students who had a conversation about career options were also very confident they would graduate with skills necessary for workplace success, while only 28% who did not have such a conversation were very confident. Similarly, the 2019 Online College Students survey shows that 49% of respondents who discussed career options with a professor, faculty, or staff member are confident they will be prepared to succeed at work, while only 21% who did not have that conversation are confident.
Do you agree or disagree with the following statements about your online learning experience?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>Neither agree nor disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The most recent online course I completed was interesting and compelling.</td>
<td>7%</td>
<td>12%</td>
<td>81%</td>
</tr>
<tr>
<td>I am confident I will graduate with the knowledge and skills I need to be successful in the workplace.</td>
<td>5%</td>
<td>14%</td>
<td>81%</td>
</tr>
<tr>
<td>The instructor effectively presented the material in my most recent online class so that I was able to learn.</td>
<td>4%</td>
<td>15%</td>
<td>81%</td>
</tr>
<tr>
<td>What I learned in my most recent online course I will be able to apply in my current or future workplace.</td>
<td>7%</td>
<td>17%</td>
<td>76%</td>
</tr>
<tr>
<td>At least one professor, faculty, or staff member has initiated a conversation with me about my career options.</td>
<td>13%</td>
<td>16%</td>
<td>71%</td>
</tr>
<tr>
<td>Discussion forums in my most recent online courses were engaging.</td>
<td>11%</td>
<td>23%</td>
<td>66%</td>
</tr>
</tbody>
</table>

**RECOMMENDATIONS:**

Students who have at least one conversation about career options with a faculty or staff member feel significantly more prepared for workplace success. Therefore, it is helpful for schools to create an environment and expectations for such conversations to happen. Online courses heavily rely on adjunct faculty, who may not be prepared to systematically initiate these conversations. However, academic advisors and career services staff can do this easily. By encouraging these conversations, schools could better prepare students for the workforce. This is important, as 47% of employers feel college graduates aren’t ready to work and 51% believe colleges don’t provide the right skills for graduates (Learning House & Future Workplace, 2018).

Discussion forums are a significant part of online courses, as students typically post and respond to other students’ posts weekly. But only 66% of respondents say that forums are engaging, highlighting an opportunity for improvement. Ways to enhance discussion forums include using them for small group activities, replacing citation-based assignments with opinion pieces, incorporating thought-provoking topics, and encouraging instructors to contribute their opinions and examples.
POST-GRADUATION SUPPORT & ENGAGEMENT

As online programs mature, there is increasing interest in how schools can maintain a relationship with their growing population of online graduates. Nearly half of current students (47%) and past students (42%) are interested in taking courses at their alma mater in the future. About one-third plan to refer students to their school, and nearly one-quarter plan to join the alumni association or attend an on-campus event. Current students and graduates gave similar responses to these questions, indicating that students decide while enrolled what kind of relationship they plan to have long-term with their school.

<table>
<thead>
<tr>
<th>Action</th>
<th>Current students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take classes there in the future</td>
<td>47%</td>
</tr>
<tr>
<td>Utilize career services</td>
<td>37%</td>
</tr>
<tr>
<td>Refer students to the school</td>
<td>35%</td>
</tr>
<tr>
<td>Join the alumni association</td>
<td>32%</td>
</tr>
<tr>
<td>Follow the school on social media channels</td>
<td>28%</td>
</tr>
<tr>
<td>Attend future college events (athletic, speaker series, etc.)</td>
<td>22%</td>
</tr>
<tr>
<td>Donate to the school</td>
<td>13%</td>
</tr>
<tr>
<td>I plan no relationship with my school in the future</td>
<td>11%</td>
</tr>
</tbody>
</table>
**Since graduation, which activities have you done or expect to do?** *(Select all that apply)*

<table>
<thead>
<tr>
<th>Activity</th>
<th>Past students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan to take classes there in the future</td>
<td>42%</td>
</tr>
<tr>
<td>Refer students to the school</td>
<td>34%</td>
</tr>
<tr>
<td>Follow the school on social media channels</td>
<td>30%</td>
</tr>
<tr>
<td>Utilize career services</td>
<td>24%</td>
</tr>
<tr>
<td>Attend future campus events (athletic, speaker series, etc.)</td>
<td>22%</td>
</tr>
<tr>
<td>Join the alumni association</td>
<td>22%</td>
</tr>
<tr>
<td>Donate to the school</td>
<td>14%</td>
</tr>
<tr>
<td>I have no relationship with my school</td>
<td>16%</td>
</tr>
</tbody>
</table>

**RECOMMENDATION:**

*The growing ranks of online alumni are a valuable resource. Recommendations from friends and family is one of the top factors that people consider when selecting a school. Alumni can also help form partnerships with companies where they work. Schools should develop forward-thinking strategies to effectively engage and leverage online graduates, drawing from communication preferences and other data gathered while students were enrolled.*
THE PERCEIVED VALUE OF ONLINE LEARNING

Online programs have suffered a negative stereotype that they produce inferior outcomes compared to their face-to-face counterparts. However, the overwhelming majority of students dispute this perception. When asked to consider if their online education was worth its cost, 84% of respondents agree or strongly agree. By contrast, only six percent disagree or strongly disagree.

My online education was worth the cost. [Current and past students]
ONLINE VERSUS IN-PERSON INSTRUCTION

Online learning stacks up well against classroom instruction, per respondents who experienced both modalities at the college level. Most of those students said online instruction was better than or equal to face-to-face instruction. However, a trend at the undergraduate level indicates fewer students feel that online instruction is better than their previous face-to-face experience, as more indicated that instruction is about the same in both modalities. There is opposite movement at the graduate level, where a greater percentage of students now feel online instruction is superior to their face-to-face experience. The percentage of students who feel online education is inferior to their face-to-face experience remains statistically unchanged.

How would you compare the instruction of your college-level online learning experiences with your college-level classroom experiences? [Current and past students with both online and face-to-face course experience]

<table>
<thead>
<tr>
<th>Year</th>
<th>Better</th>
<th>About the Same</th>
<th>Not as Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>50%</td>
<td>41%</td>
<td>9%</td>
</tr>
<tr>
<td>2019</td>
<td>39%</td>
<td>50%</td>
<td>11%</td>
</tr>
<tr>
<td>2014</td>
<td>43%</td>
<td>48%</td>
<td>9%</td>
</tr>
<tr>
<td>2019</td>
<td>52%</td>
<td>38%</td>
<td>10%</td>
</tr>
</tbody>
</table>
In the first *Online College Students* survey in 2012, 74% of undergraduates and 66% of graduate students were female. While that held fairly constant during the following six years, 2019 may signal a shift. This year’s survey reveals an influx of male students at both levels of study, with a close to 50-50 split at the graduate level. While this may be a data anomaly, it may indicate that the online population is beginning to mirror the demographics of “traditional” higher education.

One recent trend is the population of online students is getting younger. In 2015, the average undergraduate student was 32.3 years old and the average graduate student was 35. Both averages fell by nearly two years in 2019, as the average undergraduate is 30.5 years old and the average graduate student is 33.7.

<table>
<thead>
<tr>
<th>What is your gender?</th>
<th>All students</th>
<th>Undergraduate students</th>
<th>Graduate students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>40%</td>
<td>35%</td>
<td>46%</td>
</tr>
<tr>
<td>Female</td>
<td>60%</td>
<td>65%</td>
<td>54%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>
### Age

<table>
<thead>
<tr>
<th>Age</th>
<th>All students</th>
<th>Undergraduate students</th>
<th>Graduate students</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 to 24</td>
<td>32%</td>
<td>39%</td>
<td>23%</td>
</tr>
<tr>
<td>25 to 29</td>
<td>19%</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>30 to 34</td>
<td>14%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>35 to 39</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>40 to 44</td>
<td>8%</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>45 to 49</td>
<td>7%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>50 to 54</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>55 or older</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Average age</strong></td>
<td><strong>31.8</strong></td>
<td><strong>30.5</strong></td>
<td><strong>33.7</strong></td>
</tr>
</tbody>
</table>

### What is your marital status?

<table>
<thead>
<tr>
<th>Marital status</th>
<th>All students</th>
<th>Undergraduate students</th>
<th>Graduate students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married/partnered</td>
<td>44%</td>
<td>38%</td>
<td>53%</td>
</tr>
<tr>
<td>Single</td>
<td>55%</td>
<td>61%</td>
<td>46%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
### How many children under the age of 18 do you have?

<table>
<thead>
<tr>
<th></th>
<th>All students</th>
<th>Undergraduate students</th>
<th>Graduate students</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>60%</td>
<td>63%</td>
<td>55%</td>
</tr>
<tr>
<td>One</td>
<td>20%</td>
<td>18%</td>
<td>22%</td>
</tr>
<tr>
<td>Two</td>
<td>15%</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>Three or more</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>
EARNING A LIVING

Seventy-two percent of online college students at the undergraduate level work full or part time, which is also true of 70% of all college students (Powell, 2017). At the graduate level, 70% work full time and 14% work part time. The percentage of students working full time has increased in recent years, while the percentage of unemployed students has declined with U.S. employment trends.

<table>
<thead>
<tr>
<th>What is your annual household income?</th>
<th>All students</th>
<th>Undergraduate students</th>
<th>Graduate students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $25,000</td>
<td>17%</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td>$25,000-39,999</td>
<td>19%</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>$40,000-54,999</td>
<td>14%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>$55,000-69,999</td>
<td>12%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>$70,000-84,999</td>
<td>11%</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>$85,000-99,999</td>
<td>8%</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>$100,000-114,999</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>$115,000-129,999</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>$130,000-149,999</td>
<td>4%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>$150,000 or more</td>
<td>5%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>
## What is your employment status?

<table>
<thead>
<tr>
<th>Employment Status</th>
<th>All students</th>
<th>Undergraduate students</th>
<th>Graduate students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employed full time</td>
<td>59%</td>
<td>51%</td>
<td>70%</td>
</tr>
<tr>
<td>Employed part time</td>
<td>18%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>Not employed</td>
<td>20%</td>
<td>25%</td>
<td>13%</td>
</tr>
<tr>
<td>Retired</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

## What is your race or ethnicity?

<table>
<thead>
<tr>
<th>Race or Ethnicity</th>
<th>All students</th>
<th>Undergraduate students</th>
<th>Graduate students</th>
</tr>
</thead>
<tbody>
<tr>
<td>African American</td>
<td>16%</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Asian or Pacific Islander</td>
<td>8%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>10%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Native American</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>White</td>
<td>64%</td>
<td>63%</td>
<td>66%</td>
</tr>
<tr>
<td>From another background</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

## Are you the first in your family to attend college?

<table>
<thead>
<tr>
<th>Status</th>
<th>All students</th>
<th>Undergraduate students</th>
<th>Graduate students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>30%</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>No</td>
<td>69%</td>
<td>70%</td>
<td>67%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
In early 2019, Learning House and Aslanian Market Research conducted surveys with 1,500 individuals nationwide. Respondents were ages 18 and older, had a minimum of a high school degree or equivalent, and were recently enrolled, currently enrolled, or planned to enroll in the next 12 months in a fully online undergraduate or graduate degree, certificate, or licensure program.

Although graduate students represent only 15% of the total college population, they account for 27.9% of the online population (National Center for Education Statistics, 2019). The sample for this survey was weighted to include approximately 40% graduate students to ensure a large enough sample for meaningful conclusions. The data are presented for both undergraduate and graduate students combined unless there were noteworthy differences.

Aslanian Market Research’s partner interview group identified the sample of 1,500 respondents. The organization drew the sample from its actively managed, 100% market research-only panel that represents the U.S. Census Bureau, which enables the selection of groups that prove difficult to source. Up to 250 behavioral and demographic data points on each consumer panelist have been collected, which allows Aslanian Market Research to target respondents for specific research objectives.

To recruit for this study, a panel of consumers from across the nation was invited to participate in an online survey. Custom email invitations were sent randomly across the U.S. to reflect the basic population distribution, targeting people 18 and older. Panelists were then allowed to participate in the study if they had participated in an online program of study within the past 36 months, were currently enrolled, or were planning to enroll in a fully online degree, certificate, or licensure program within the next 12 months.
Respondents hail from all 50 states. States that represent 51% of the nation’s population (according to the 2012 U.S. Census) represent 52% of the study’s respondents. These states include California, New York, Florida, Colorado, Illinois, Texas, Georgia, New Jersey, Pennsylvania, and Ohio.

The National Center for Education Statistics IPEDS data shows that, in 2017, 3.1 million higher education students were enrolled in courses that were exclusively delivered via distance education. In 2017, Eduventures estimated the size of the wholly or majority online program market for the fall of 2018 to be 3.9 million students. Based on these findings, a sample of 1,500 represents approximate sampling error of +/-2.6% at a 95% confidence level.

A similarly small margin of error was achieved in each annual survey conducted from 2012 to 2018; therefore, differences between these survey results over six percentage points may be significant. We only address differences between the surveys that are at least 10 percentage points to err on the side of caution. The margin of sampling error is greater for subgroups.

TECHNICAL NOTES

All percentages in this report have been rounded; therefore, the total percent figure in a table may not equal 100. Furthermore, if the total percentage is substantially more than 100, it is because the question allowed respondents to choose more than one option.
REFERENCES


PARTNERS

**Wiley** drives the world forward with research and education. Our scientific, technical, medical, and scholarly journals and our digital learning, certification, and student-lifecycle services and solutions help students, researchers, universities, and corporations to achieve their goals in an ever-changing world. For more than 200 years, we have delivered consistent performance to all of our stakeholders. The Company’s website can be accessed at www.wiley.com.

**Wiley Education Services, a division of Wiley,** is a leading, global provider of technology-enabled education solutions to meet the evolving needs of institutions and learners. With the addition of Learning House, a Wiley Brand, we partner with more than 60 institutions across the US, Europe, and Australia, and support over 800 degree programs. Our best-in-class services and market insights are driven by our deep commitment and expertise—proven to elevate enrollment, retention, and completion rates. For more information visit edservices.wiley.com.

**Learning House, a Wiley brand,** helps people improve their lives through education. As a complement to the technology-enabled education solutions offered by Wiley Education Services, we partner with more than 60 institutions across the US, Europe, and Australia, and support over 800 degree programs. Additional solutions include Enterprise Learning Solutions, The Software Guild, Learning House International and Advancement Courses. Through our broad portfolio, Learning House, a Wiley brand, delivers more students, more graduates, and better outcomes.

**EducationDynamics** is a proven leader in helping higher education institutions find, enroll, and retain students. The organization maintains its industry leadership through a deeply rooted philosophy of serving our schools best by serving students first. This commitment has been at the heart of its success since it began more than a decade ago, and it continues today as we proudly serve more than 1,200 colleges and universities of all types and sizes.

**Aslanian Market Research** (EducationDynamics’ market research unit) conducts market demand studies, institutional audits, program and marketing reviews, and professional development seminars and workshops for colleges and universities seeking information and data on how to expand adult and online student enrollments. Throughout the last 25 years, our staff has worked with more than 200 colleges and universities of all types — public, private, large, small, rural, suburban, and urban — in every region of the U.S. Its seminars have provided thousands of college administrators with practical, hands-on tactics that they can implement at their institutions at minimal cost for maximum impact.
AUTHORS

CAROL B. ASLANIAN is Founder and President of Aslanian Market Research. She is a national authority on the characteristics and learning patterns of adult students, and she has made hundreds of presentations on the topic and led market research projects for more than 300 colleges, universities, and educational agencies. Since 2012, she has co-authored eight editions of *Online College Students*.

DR. DAVID L. CLINEFELTER’S career has spanned all levels of education, from K–12 to higher education. He served as a teacher, principal, and public school superintendent with stops in Ohio and Iowa. At the postsecondary level, he has been a provost and president with experience in the for-profit and nonprofit sectors. In each of these roles, he focused on improving teaching and learning through the application of technology. Since 2012, he has co-authored seven editions of *Online College Students*.

ANDREW J. MAGDA is the Manager of Market Research for Learning House. He leads in the development of custom and large-scale market research studies and assists partner institutions with their research needs. Prior to Learning House, Magda was a senior analyst at Eduventures and a project manager at the Center for Survey Research and Analysis at the University of Connecticut. Since 2012, he has contributed to the writing and analysis of seven editions of *Online College Students*.

FOR ADDITIONAL INFORMATION, CONTACT:

<table>
<thead>
<tr>
<th>Learning House, A Wiley Brand</th>
<th>Aslanian Market Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>(502) 589-9878</td>
<td>(201) 377-3321</td>
</tr>
<tr>
<td><a href="mailto:sthompson@wiley.com">sthompson@wiley.com</a></td>
<td><a href="mailto:caslanian@educationdynamics.com">caslanian@educationdynamics.com</a></td>
</tr>
<tr>
<td><a href="http://www.learninghouse.com">www.learninghouse.com</a></td>
<td><a href="http://www.aslanianmarketresearch.com">www.aslanianmarketresearch.com</a></td>
</tr>
</tbody>
</table>