

THE SUPER STORM IN HIGHER EDUCATION CHALLENGES DRIVING CHANGE

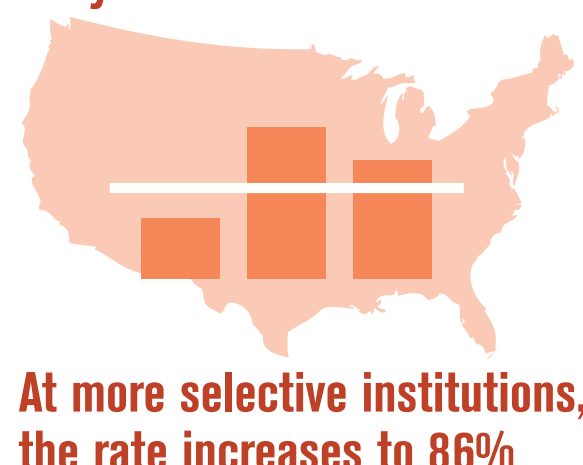
COMPETITION

The Millennial generation has brought a change not only in student demographics, but expectations for, and from, their education

35%
of prospective students research colleges in detail via social



59%
national average for first-time students graduating in six years



At more selective institutions, the rate increases to 86%

89%
of institutions paying more attention to enrollment management



up from 5 years ago

1 in 9
students are likely to transfer to a different institution after one year



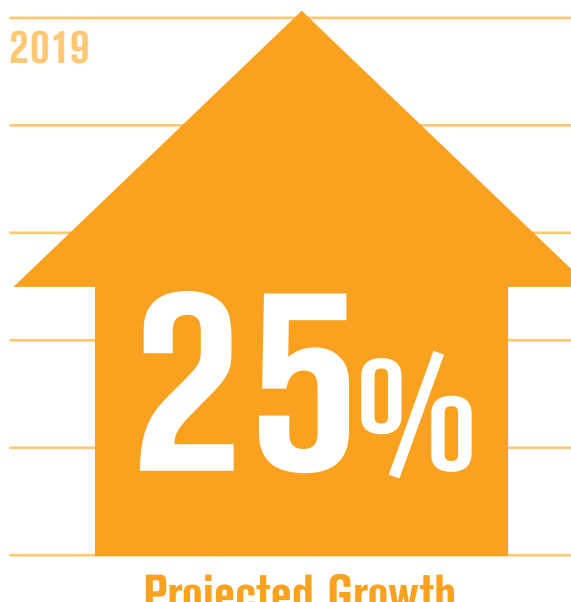
CAMPUS MANAGEMENT Client Results

+22.5%
Undergraduate Applications

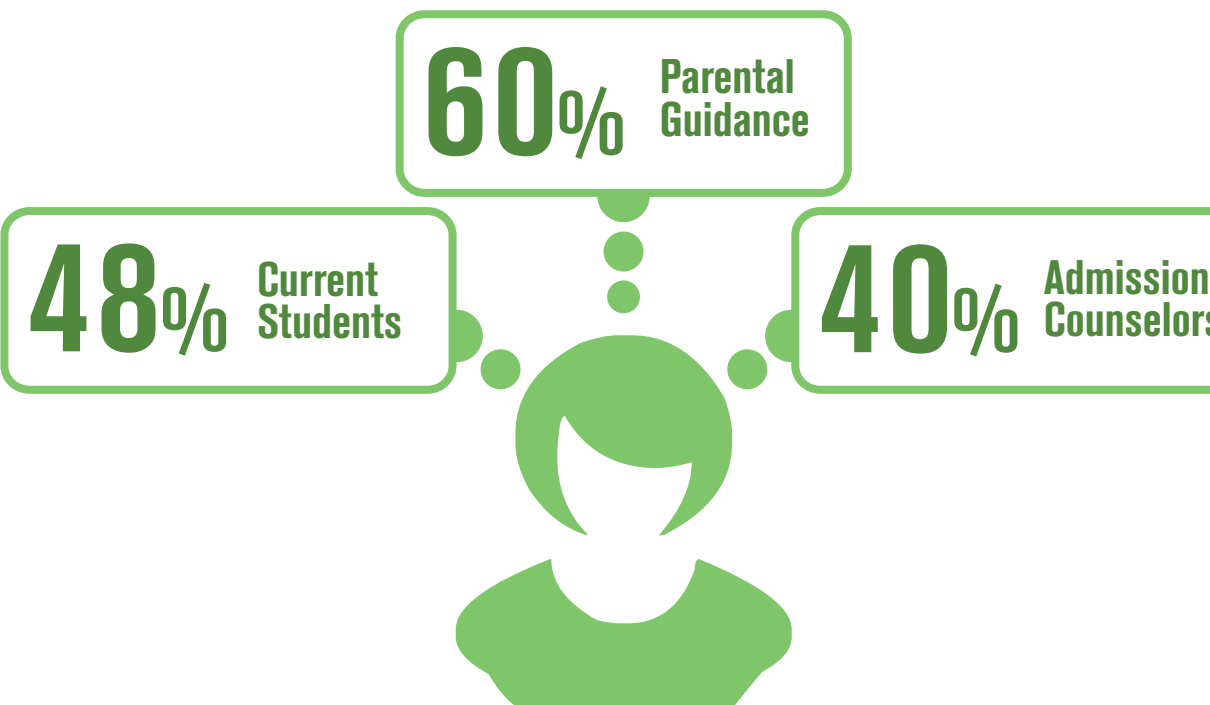
+42.4%
Freshman Enrollment

+16.2%
Transfer Applications

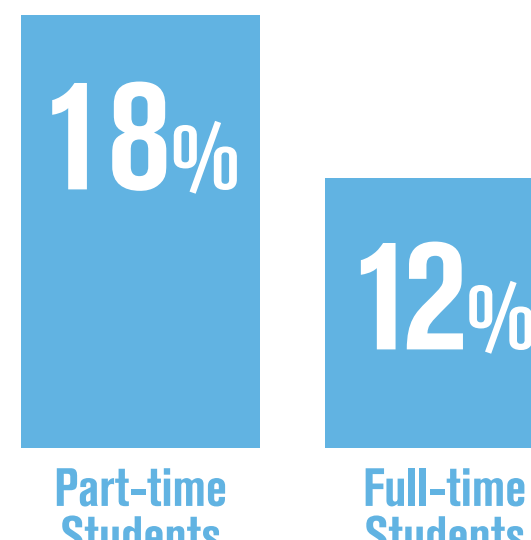
Postsecondary enrollment of adults 25yrs or older



Strongest influence on student enrollment choices



Projected student enrollments increase by the year 2021



DELIVERY

Students expect to have learning options that meet their needs; programs that are on-campus, online and blended

Blended Programs

Blended Solution Enrollment



33%
of students have taken at least one online course as part of their post-secondary education

Improved Comprehension and Test Scores



84%
have improved comprehension and test scores using blended education model

CAMPUS MANAGEMENT Client Results

On-campus Enrollment = 5,000

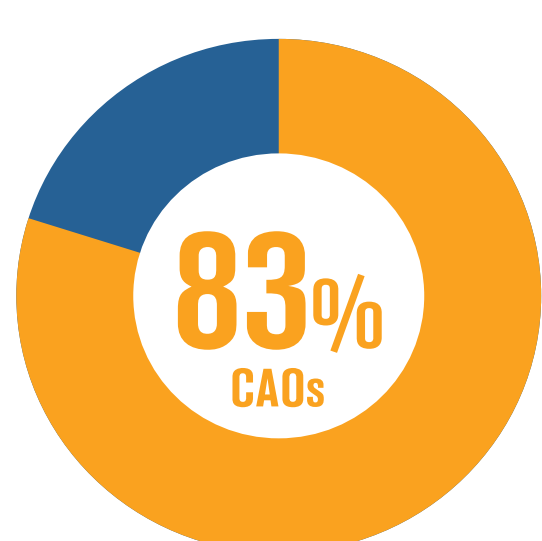
With Flexible Nonterm Programs

On-campus Enrollment + 4,000

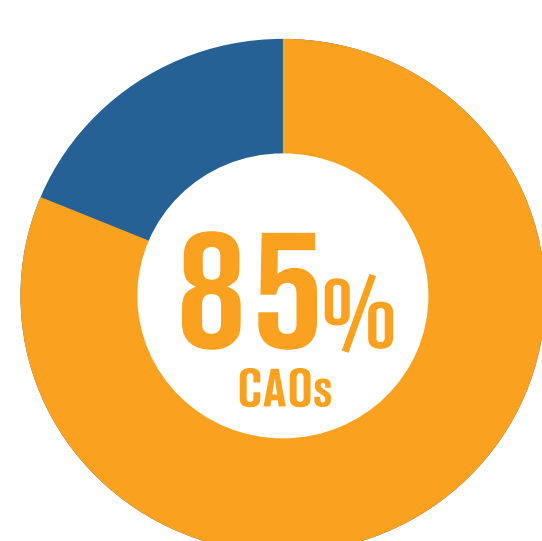
Online Enrollment + 31,000

40,000
Total New Enrollment

Technology Resources



Interested in Expanding Online Programs

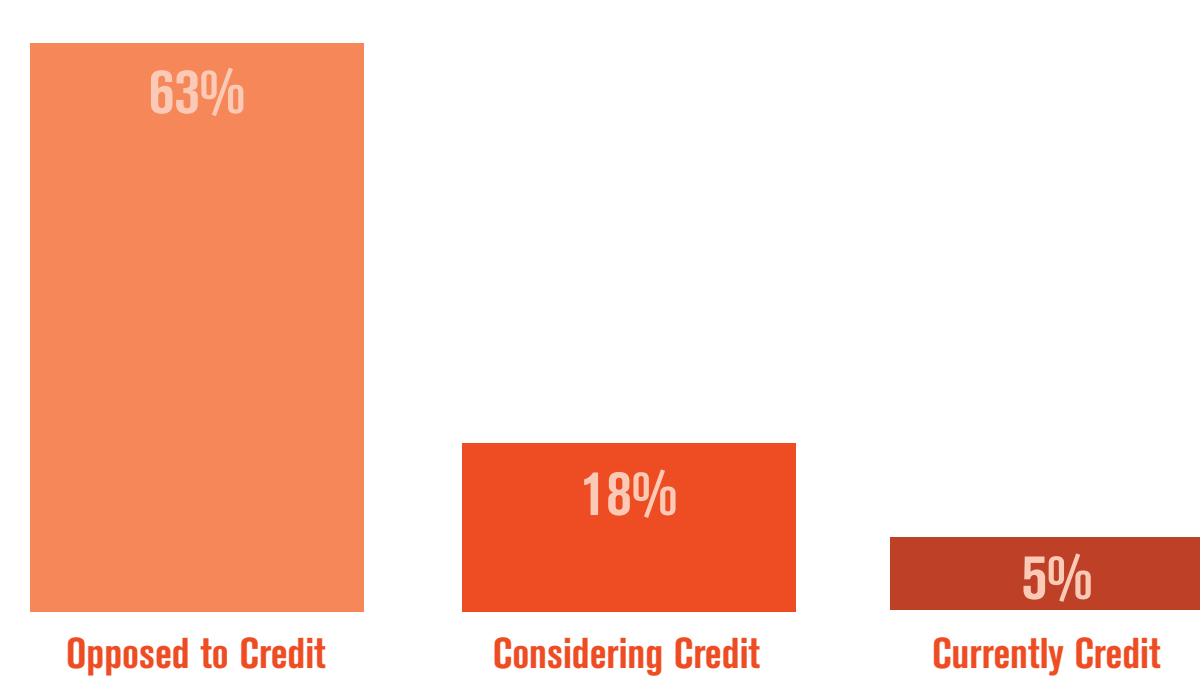


Rate Online Learning Technology Resources and Services as Effective

CAO = Chief Academic Officer (Provost)

MOOCs

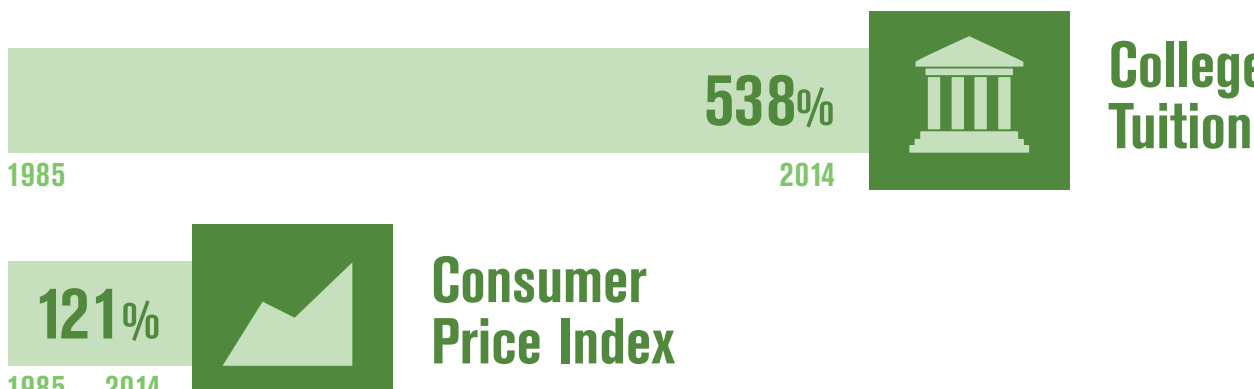
What CAOs are saying about awarding credit for MOOCs



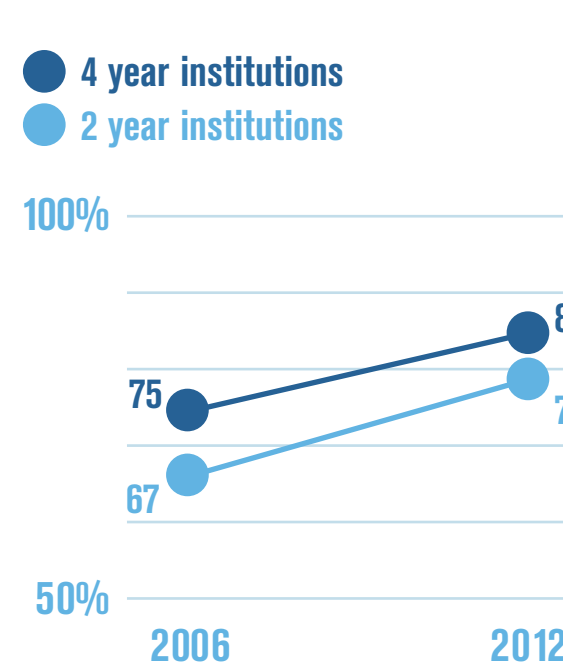
FUNDING

Institutions are challenged to reduce the cost of administrative functions, better leverage financial aid, and strategically align funding across the institution

College tuition has increased since 1985, compared to the consumer price index (CPI)



Increase in number of first-time students receiving some financial aid



67%
of Business Officers polled agree with media reports that higher education is in the midst of a financial crisis



With sources of funding dwindling, Business Officers focus on;

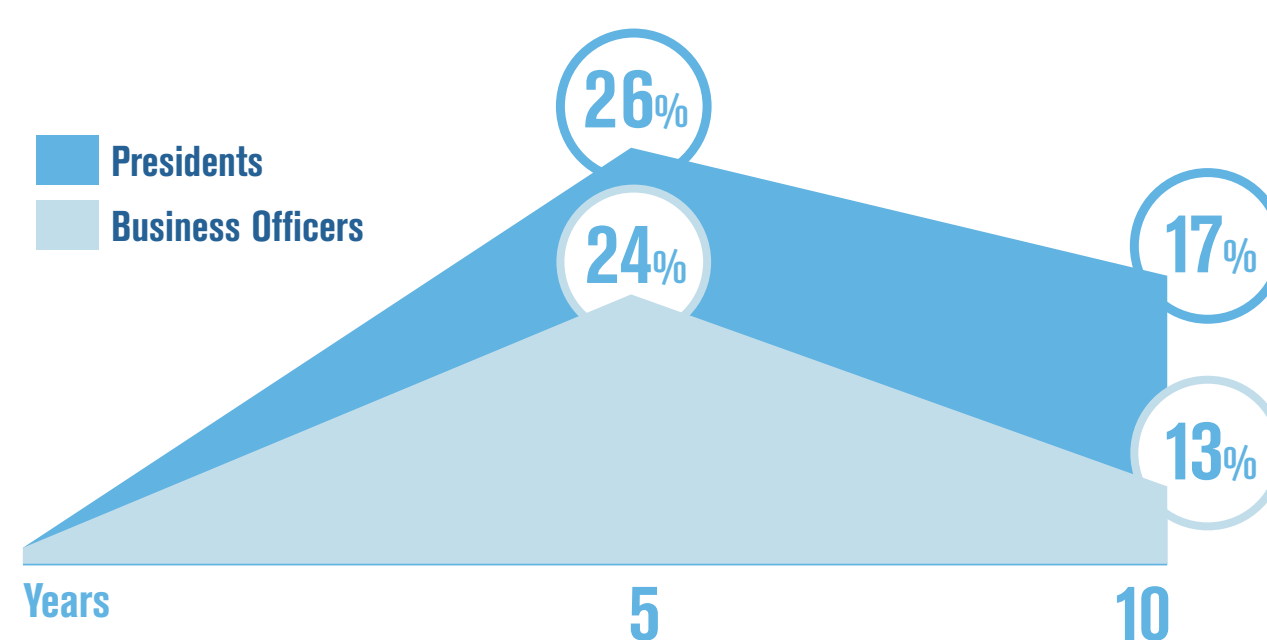
77%
Increasing Net Tuition Revenue

54%
Recruiting Full-pay Students

57%
Reallocation vs New Revenue

66% of CAOs also believe that new funds for spending on academic programs will come from reallocation

Less than 1 in 4 Presidents/Business Officers believe their institution has a sustainable financial model over the next 5-10 years



OUTCOMES

With increasing regulatory pressures, institutions must comply with evolving requirements and demonstrate the achievement of its students

Institution presidents:

50% agree it is appropriate for the federal government to collect and publish data on placement and other outcomes of college graduates

13% agree the federal government has a good chance of accurately collecting and reporting data on higher education outcomes

CAOs believe:

62%
CAOs

Competency-based Education Can Save Students Considerable Money

43%
CAOs

Competency-based Education May Be Damaging to General Education Programs

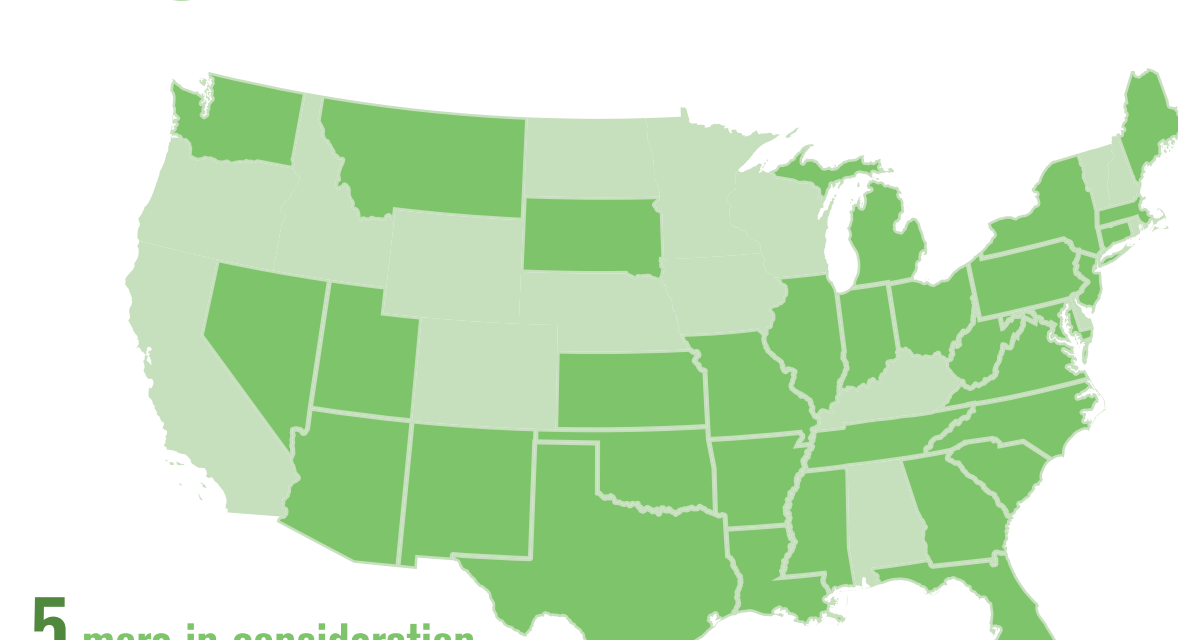
72%
of Business Officers cite the cost of responding to government mandates as an issue

capturing more attention than 5yrs ago

87%
of CAOs are placing more attention on the ability of their degree programs to help students get good jobs



25 states have enacted some form of legislative initiative to tie student outcomes to funding for institutions



5 more in consideration

CAMPUS MANAGEMENT Client Results

Track relationships with graduating students and potential employers

Student Graduation

Placement Verification

Post Graduation Re-verification

Generate Placement Report

Data sources: National Center for Education Statistics; National Conference of State Legislatures; The 2014 Inside Higher Ed Survey of College & University Presidents; The 2014 Inside Higher Ed Survey of College & University Business Officers; The 2014 Inside Higher Ed Survey of College and University Chief Academic Officers; The 2013 Survey of Online Learning by The Babson Survey Research Group and The Sloan Consortium; GrantThornton Third Annual Report 2014 The state of higher education in 2014; Reimagining higher education, A GovLab report

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