



Opportunity Analysis Phase 2

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Executive Summary



The Board of Trustees must propel CWI to seize the moment and pursue three vital growth opportunities.



Advance digital learning

Prioritize high-quality
online and hybrid programs



Maximize employer partnerships

Develop a comprehensive
workforce engagement strategy



Redefine student success outcomes

Lead on redefining **successful
outcomes** for students in Idaho

Advance Digital Learning

- Our culture is reorienting toward convenience, meaning that more people are living their lives digital-first and expecting the same from their education.
- With higher education being forced online due to COVID-19, there will be a lot more competition soon to reach and engage students.
- **CWI must have a strong perspective, value proposition, and footprint in digital education to stay competitive and meet students where they are in the coming years.**



Maximize Employer Partnerships

- More and more higher education institutions, including four-year schools, are moving into the workforce training space.
- Without a strong strategy to defend and grow its workforce training position, CWI is vulnerable to competitors.
- **CWI must engage employers and industry deeply to stake out a strong position in the higher education and workforce development markets.**



Redefine Student Success Outcomes

- Capturing metrics that demonstrate the value of affordable, accessible education providers has always been a struggle for community colleges.
- The definition of student success is changing away from completing a degree to other critical outcomes including job placement, transfer, promotion, and skill acquisition.
- **CWI has an opportunity to lead on redefining “success” in Idaho, elevating its brand and value proposition in a way that is highly differentiated from state peers in the process.**



The Board can facilitate transformational growth at a pivotal moment by pursuing these three opportunities in tandem.

The Board can pursue these three opportunities and make a big impact by developing CWI's Boise campus through a public-private partnership with an employer.



The CWI Community Hub

This creative campus meets learners where they are, especially in a post-COVID world; makes space to connect with industry; and creates a community convening hub in southwestern Idaho.

Using a PPP to invest in community space jointly, CWI can provide entrepreneurship and community partnership space, innovative learning environments, student services offices, a place for student connection, and commercial space for businesses.

Advance Digital Learning

Instead of needing to use new campus space for traditional classrooms, CWI can offer a more dynamic place for community to convene and share, with innovative learning spaces such as a makerspace, design studios, and/or research labs.



Maximize Employer Partnerships

Sharing responsibility and space with employer(s) would heighten collaboration, proximity, and affordability for CWI and its community.

Redefine Student Success Outcomes

CWI can provide students with space for networking, connecting with supports/services, and accessing professional opportunities.

Our three-pronged analysis pinpoints opportunities grounded in CWI's position, differentiators, and growth potential.

Understanding **current and emerging trends in the higher education space** enables CWI to best position itself for success in an evolving landscape.

Examining CWI's **Idaho competitors, peer institutions, and other successful educational institutions** yields community college approaches to consider.

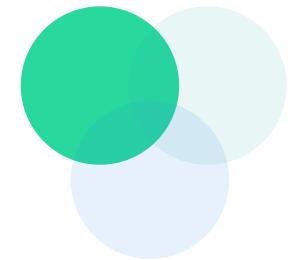


Reviewing **program and labor market demand** uncovers the highest-potential program expansions for CWI.

► Opportunities

Significant shifts in higher education make it imperative that CWI embrace change.

- Institutions must **get comfortable with change** in order to weather the increasingly complex and challenging conditions of higher education, such as competition from emerging providers.
- To be an institutional leader of tomorrow, a school must **design for diversity** and prepare to serve a greater range of students, including working adult learners, through lifelong engagement.
- Community colleges are ideally positioned to **maximize the potential of online learning** and reach more students with convenient, career-aligned programs, especially in the Treasure Valley and Idaho.
- To keep and attract students in the future, community colleges must invest to **provide a seamless student experience**, coordinated cross-institutionally, that improve completion, transfer to partner institutions, and employment outcomes.

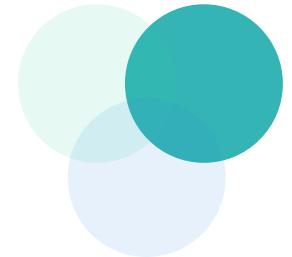


Key Trends in Higher Education

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CWI should shape its portfolio to meet growing learner and employer demand.

- There's room to grow CWI's portfolio by serving unmet program and labor market demand in **Health, Business, and Computer Science & Information Systems**.
- Growing Liberal Arts from a position of strength can increase CWI's reputation and reach as a **first-choice transfer institution**.
- Increased demand for certificates indicates that **shorter bursts of learning** are desirable to students, but not in all programs.

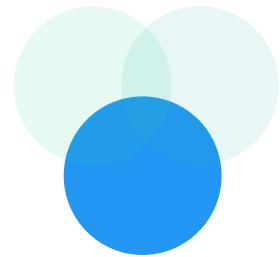


Program & Labor Market Demand

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Benchmarking CWI against its peers and competitors allows the school to better understand its current position.

- CWI can step forward and fill the current provider gap to lead Idaho in **distance education**.
- **Industry partnerships** are a critical component of success for all community colleges.
- Pairing student success initiatives with tailored technology solutions is a critical part of **improving student outcomes**.
- Other successful institutions have become regional pillars through **holistic community development and strong leadership support**.



Peer & Competitor Analysis

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The Board of Trustees must guide CWI to change.

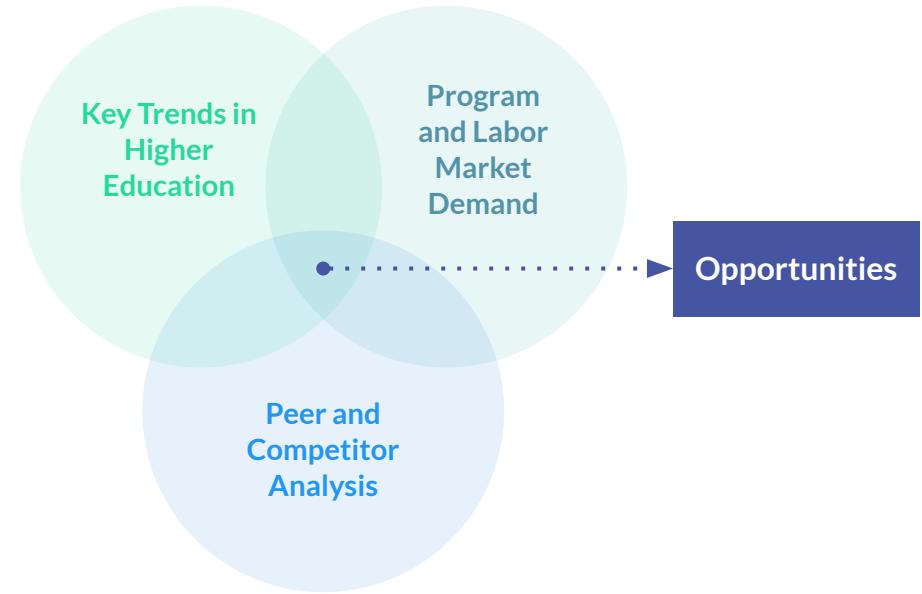
There is no returning to “education as usual” post-COVID-19, and CWI must embrace and maximize that.

As CWI plans for the next 10 years during these turbulent times, the current uncertainty presents an opportunity for CWI to emerge as a leader. Our analyses underscore that CWI is well poised to make an incredible impact in the region and beyond. The Board’s **ability to seize this moment and commit to action** will set the school and its students up for success through the difficult road ahead.





Opportunity Analysis



Over the next decade, CWI can grow into the community college of the future.

For the last 13 years, CWI has been building out the institution in all directions to meet the metrics and priorities expected of a community college. Our analysis has identified **three important trends** that community colleges in general, and CWI in particular, must respond to in the coming decade.



Community colleges were built to meet learners where they are and to offer learning relevant to their particular circumstances. Today, that includes **online learning**.



Community colleges have historically differentiated themselves from other educational institutions through **workforce partnerships**. Now, other educational institutions are moving aggressively into this space.



Community colleges are known for offering low-cost progress toward credentials. But the national dialogue in education has shifted to emphasizing **success outcomes**, not just cost.

The Board of Trustees must propel CWI to seize the moment and pursue three vital growth opportunities.



Advance digital learning

Prioritize high-quality
online and hybrid programs



Maximize employer partnerships

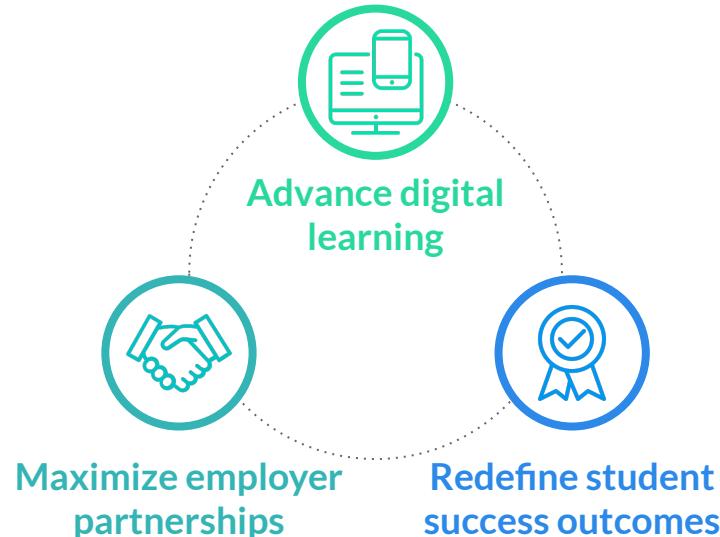
Develop a comprehensive
workforce engagement strategy



Redefine student success outcomes

Lead on redefining **successful outcomes** for students in Idaho

These three opportunities are not only advantageous for CWI, but a necessary step to deliver on the school's responsibility to the Treasure Valley and Idaho.



All opportunities satisfied 4 key criteria:

1. Require Board-level investment and endorsement
2. Align with trends and data found in the higher education trends, program, job, and peer/competitor analyses of this project
3. Advance the sustainability and continued growth of CWI
4. Are in areas where CWI can “win”

Advance digital learning



It is imperative that CWI develop digital-forward offerings that reach, and lower barriers for, tomorrow's learners.

CWI must serve more students through affordable online and hybrid offerings, particularly in high-growth, well-paying areas in which CWI can still grow, including Health, Business, and Computer Science/IT. These programs must offer an excellent student experience and interface and diverse credential types, including shorter-form offerings.

Why **this** opportunity,
based on learnings from
the analyses?



More and more students are **taking at least some of their college coursework online**, making online and hybrid learning options essential in the future of higher education.



The advent of **COVID-19** has accelerated change in distance learning; institutions should not expect to return to “business as usual” on campus.



CWI's current physical building space makes **capacity a concern** when projecting growth, fueling the school's initial online entry and reinforcing its continued movement in the area.

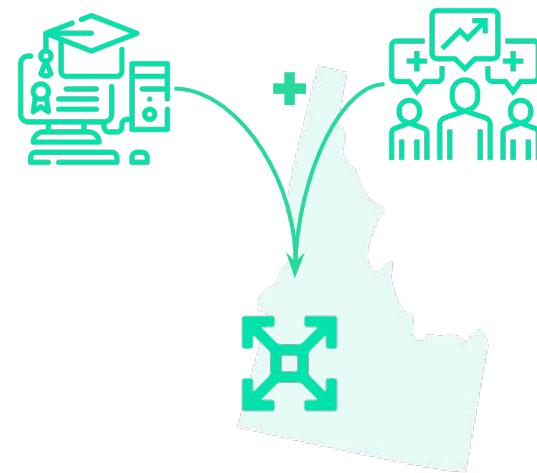


CWI **serves a larger geographic area** than most community colleges, meaning current and prospective students, especially rural ones and working adult learners, may either struggle to study entirely at a physical campus location or prefer not to spend significant time travelling to access CWI's high-quality learning.

Expand CWI's online impact by launching new, high-potential programming designed for a virtual context.

How might CWI do this?

- As CWI refines its degree portfolio to address high-growth, high-demand credential areas (e.g., Computer Science/Information Technology, Business, and Health), the school must design **new programming for a hybrid context** to meet demands and ensure offerings are accessible to a wide audience.
- As students seek convenience and flexibility, CWI should both **improve the student user experience and interface** for its existing online opportunities, and offer a greater variety of learning opportunities (from bite-sized credentials through degrees), making online learning excellent for those who need it.



Provide a 21st-century community college experience and reach more learners by expanding digital learning.



Advantages

- Expands **flexible, convenient offerings** for new, existing, and former students, and the faculty teaching them, regardless of their ability or willingness to access campus
- **Leverages existing programming gaps** as a space to pilot more robust online offerings
- Allows CWI to **quickly move into white space** in Idaho at an unparalleled price point
- Does not require CWI to build more classroom space as it **scales**

Challenges

- Requires significant and sustained financial **investment**
- Could uncover that **existing online offerings don't align** with the online learning needs of the future
- Depends on faculty and staff expertise, training, and **buy-in**

Why CWI is uniquely positioned to succeed

- There isn't an in-state, two-year powerhouse in the online space in Idaho, leaving room for CWI to seize that spot.
- CWI already has preliminary online infrastructure on which to build.
- In-state tuition would be affordable than tuition at larger-scale online institutions like SNHU and WGU. CWI can offer programming that connects more to employers in the region and state.

**Maximize
employer
partnerships**



To maintain and expand CWI's role in Idaho's workforce, deepen engagement with employers.

CWI's role in the future of work in Idaho depends on strengthening and broadening partnerships with employers and co-designing credential programs with them.

Why **this** opportunity,
based on learnings from
the analyses?



During Sensemaking, the CWI community identified a need for greater **coordination and tools to manage relationships** with employers in the region. To get the most out of the powerful connections CWI already has established, addressing this is key.



Bridging the gap between higher education and workforce needs requires communication and collaboration. As a community college with CTE and workforce development programming, CWI has a key responsibility to position itself to **meet demands from the local, regional, and national economy.**



Partnerships, such as Public-Private Partnerships (PPPs), are ways to maximize an institution's core capabilities and leverage external relationships to co-invest in mutually beneficial solutions to community needs.

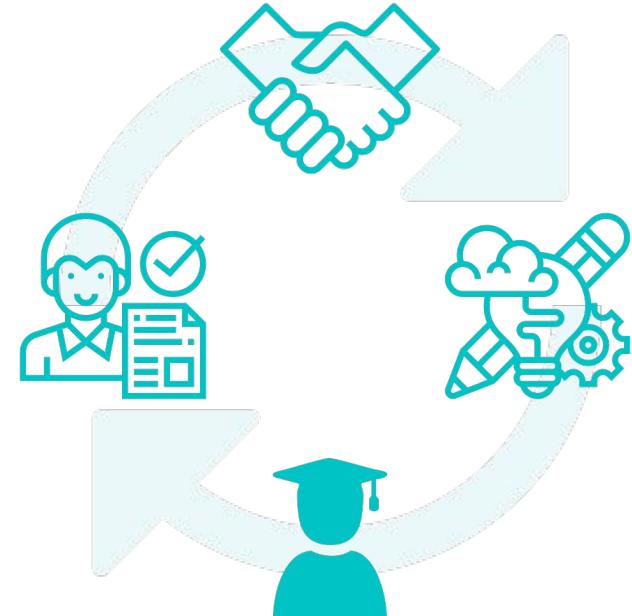


With a potential recession and economic hardships ahead, CWI's role as a provider of credentials and training make it an invaluable resource to Idaho. It is increasingly strategic for CWI to seize this moment to **prepare to meet impending need.**

Develop a strategy across CWI for rapidly assessing and building robust, sustained partnerships and credentials with the right employers.

How might CWI do this?

- A strategy must be developed to **identify, build, and sustain partnerships** with advantageous employers.
 - Relationships with those employers must be tracked and shared through a centralized, coordinated, and cross-institutional effort.
 - Students can get connected to employment opportunities during and after their time as students.
- CWI needs to **create the capacity to rapidly respond to employer demand** by spinning up employer-sponsored and -aligned offerings that are valuable to CWI students and meet target needs in the regional economy.



CWI can broaden and deepen its footprint in the Treasure Valley as an essential workforce partner.



Advantages

- Meets growing needs of the region as the country prepares to enter a recession and navigates rising unemployment rates
- Gets the most out of employer partnerships and **maximizes the opportunities for CWI students and the institution** that would result from collaboration
- Reinforces CWI's position as a regional pillar that can **rapidly meet industry needs**

Challenges

- Requires organic relationships fostered across the institution to become coordinated and organized in a more intentional way, which may include some **discomfort** for the owners of those connections.
- Requires **investment in, and training up on, a CRM tool** that will centralize information, alleviate duplicative efforts, and minimize missed opportunities

Why CWI is uniquely positioned to succeed

- External stakeholders and employers, particularly in manufacturing, know of CWI and value the institution in the region; CWI's recent entrance into a talent pipeline management program bringing together higher education and businesses is a testament to their existing efforts from which they can build.
- As a young, nimble institution, CWI can more quickly adapt to employer needs than a traditional 4-year that structurally cannot be as responsive to workforce demand.

**Redefine
student
success
outcomes**



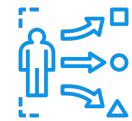
CWI must develop and design for metrics that reflect the myriad ways the college enables learners to succeed.

By aligning the institution around the student outcomes that demonstrate the progress learners are able to make in their education and careers through a community college, CWI can bolster new enrollments, sustain old ones, and play an invaluable role in the higher education journey of all prospective college students in the state and beyond.

Why **this** opportunity,
based on learnings from
the analyses?



All of the institutions profiled in CWI's peer analysis are in some stage of a **cross-institution student success initiative**.



Retention and completion are key metrics prospective students and employers value. Schools will differentiate themselves in an increasingly competitive higher education market by providing a high quality experience and demonstrating powerful success outcomes.



Growth for CWI should involve serving more students. But elevating CWI's brand to prospective students and sustaining enrollment can no longer be a unit-by-unit effort but will **only be successful as an institution-wide effort**.

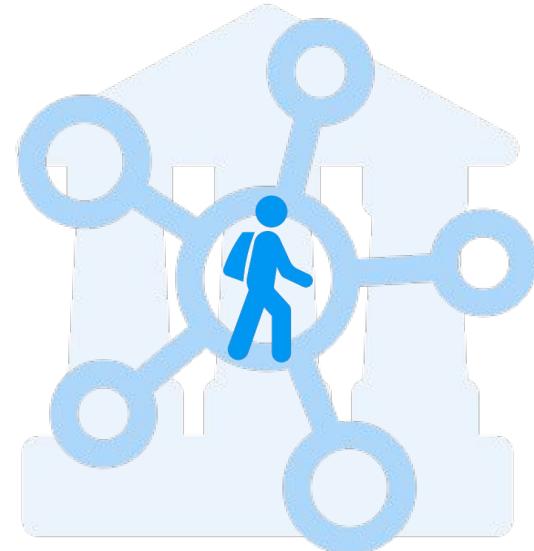


Attracting new students is considerably more expensive than retaining existing ones, so efforts to keep CWI learners, including prospective students, in the dual-credit/dual-enrollment pipeline will positively impact the institution's **financial sustainability**.

Launch an institution-wide success and experience redesign measured by new, appropriate student outcomes to accelerate growth.

How might CWI do this?

- CWI must launch an **institution-wide success reform** initiative by:
 - Investigating and codifying what success means for a community college learner post-2020
 - Engaging students to understand catalysts for, and barriers to, success within the institution and target post-study results
 - Exploring how CWI students navigate the college physically (how CWI uses space) and virtually (from their application experience to online course experience)
 - Designing for the ideal student experience and aligning units around a learner journey that minimizes friction en route to the redefined outcomes
- Fortifying CWI's **four-year transfer strategy** to ensure that students interested in pursuing a four-year degree have a seamless process for transitioning. This sets CWI up as *the* community college transfer options for students, not just in the state but also in adjacent geographies.
- **Strengthening pathways** from high schools through to four-year institutions will ensure that students choose CWI when seeking an education offering that best sets them up for success.



CWI can lead in Idaho and the community college landscape by articulating and tracking outcomes that best demonstrate the school's value to students.



Advantages

- Improves outcomes for CWI students
- Elevates perceptions of CWI in the state and across the community college landscape by engaging in innovative student success measurement efforts, making **CWI synonymous in the region with quality and a reliable return-on-investment**
- Opens up **leadership opportunities** for CWI in the national narrative around community colleges

Challenges

- **Significant time and financial investment** is needed, not just in processes but also in choosing the right vendor(s) and implementing tools and technology that address the institution's needs
- Requires **transformation across the entire institution** to be successful, from IT to IR
- Student success is still an evolving concept and approaches are also evolving, meaning that keeping up is a **sustained engagement**

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Why CWI is uniquely poised to succeed

- Enrollment has been growing to date despite decline in the state/country, so CWI already has a legacy of enrollment momentum from which to build.
- CWI has a significant number of dual enrollment students that are a key pipeline to enrollment.
- CWI can build or fortify existing partnerships with four-year institutions in the state
- The institution already has unit-by-unit efforts to improve student outcomes as they are currently measured.

To validate the strength of these opportunities, we assessed each one across five criteria.

Methodology

In order to better evaluate the three opportunities, Entangled created a rating system where each idea is evaluated on how well it matches identified criteria.

This system is meant to illuminate similarities and differences among various ideas and should not be considered a formal quantitative ranking.

Criteria

Market value	Impact the opportunity can have on CWI's position in Idaho and the higher education market
CWI advantage	Confidence in CWI's unique and differentiated position to excel in executing on the opportunity
Investment	Resources (time, money, and human capital) necessary for the opportunity to succeed
Return on investment	Estimated financial and mission returns the school will see from its investment in the opportunity
Relevance	Alignment of the opportunity with CWI's existing initiatives and priorities

This evaluation demonstrates the potential of all three opportunities individually.

		Key	1	2	3
Implementation	Impact	Advance digital learning	Maximize employer partnerships	Redefine student success outcomes	
		Market value	✓	✓	✓
		CWI advantage	✓	✓	—
		Investment	✗	—	—
		Return on Investment	✓	✓	✓
		Relevance	✓	✓	✓

The Board can facilitate transformational growth at a pivotal moment by pursuing these three opportunities in tandem.

The Board can advance these three opportunities woven together to make a big impact: developing CWI's Boise campus through a public-private partnership with an employer.



The CWI Community Hub

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Advancing Digital Learning

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Maximizing Employer Partnerships

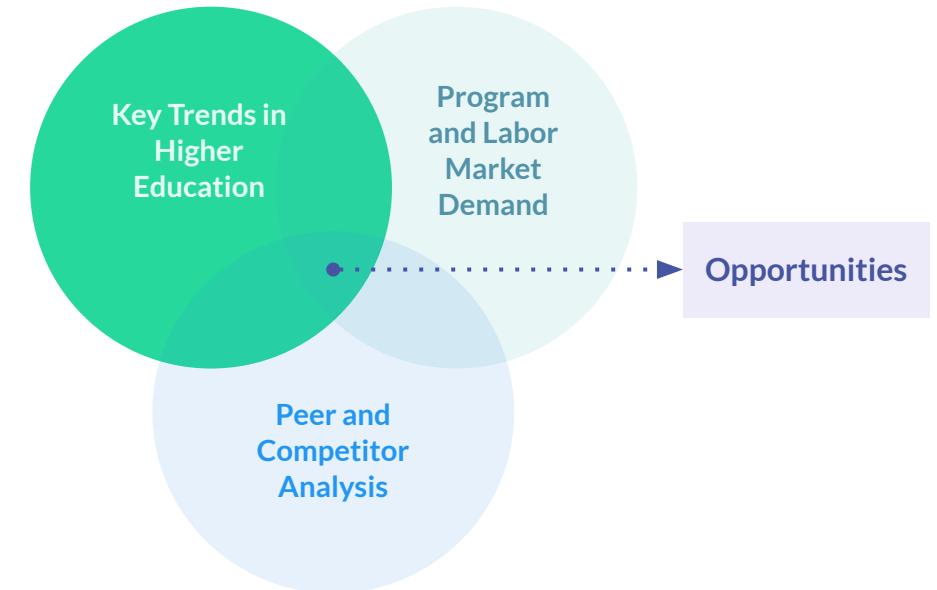
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Redefining Student Success Outcomes

CWI can provide students with space for networking, connecting with supports/services, and accessing professional opportunities.

A photograph of a young woman wearing a black graduation cap and gown. She is smiling broadly with her mouth open, showing her teeth. A pink tassel hangs from her cap. The background is a blurred indoor setting with brick walls.

Key Trends in Higher Education



Understanding key interrelated trends in higher education enables CWI to best position itself in an evolving landscape.

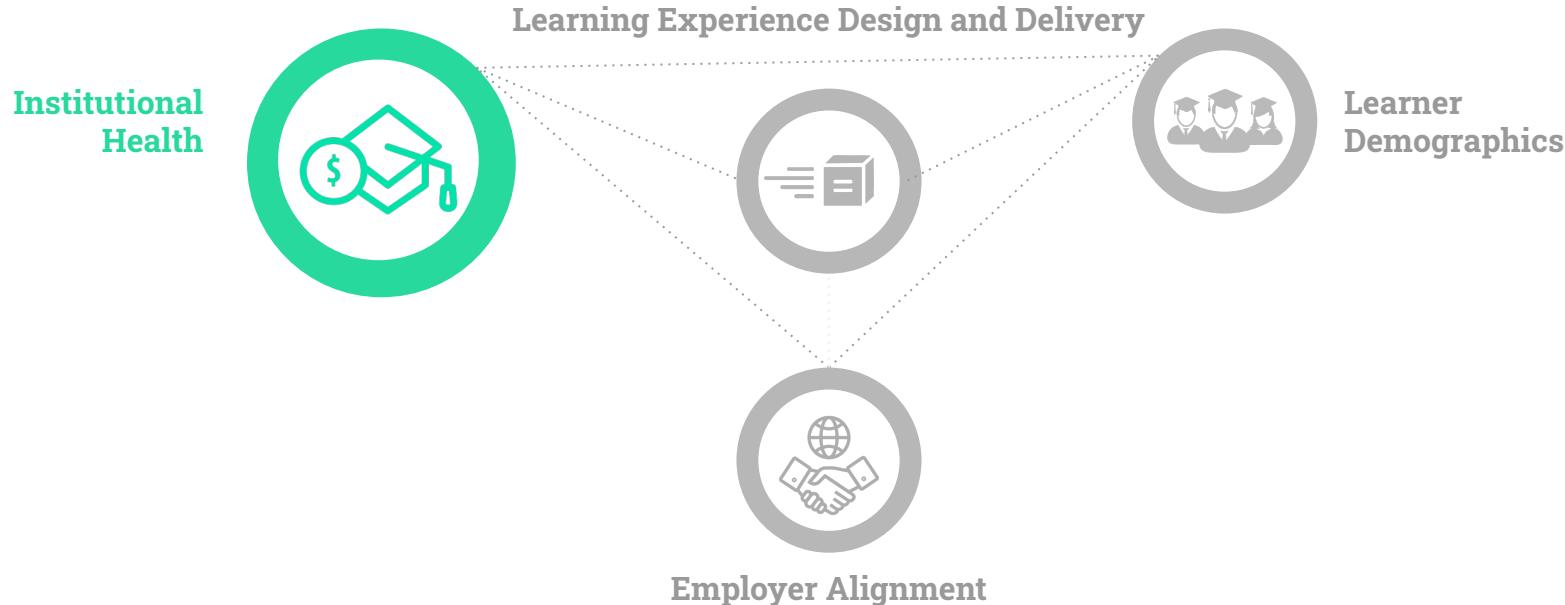
There are four major, interconnected factors influencing higher education. Entangled has analyzed each area to identify trends that CWI should take into account as it plans its next ten years. **These four interrelated factors influence one another to change the landscape.**





Trends in Institutional Health

Institutions have been under considerable financial pressure since the Great Recession, forcing institutions to make strategic moves towards greater sustainability.



Key takeaways about institutional health for CWI:



Weathering the increasingly complex and challenging financial conditions of higher education requires a willingness, if not an eagerness, to change. Balancing the complexities of identifying new revenue sources, getting savvier about using existing resources, and dealing with an increasingly skeptical audience for traditional higher education highlight the increased demands on institutional leadership, extending expectations far beyond the academic core. Being innovative, creative, and bracing a community that is often resistant to change for change is key.



Success and sustainability are hard to do alone. Partnership, collaboration, and innovation with other sectors and institutions is a way that institutions are making the most progress towards sustainable in an uncertain future.



Institutions must identify ways to maximize existing resources and supplement traditional sources of funding and revenue. Especially as the country enters another financial crisis, public sources of funding and tuition paid by students hit by the recession likely will not be enough to maintain financial health. Previous structures for funding, both for schools and for the students, are likely to be unreliable in the future.

Trends in institutional health are organized by drivers of change and the resulting impacts of those forces:



Drivers	Impacts
<ul style="list-style-type: none">• Decreasing public funding• Increased cost to deliver education	<ul style="list-style-type: none">• Increased tuition prices• Increased student debt• Increased skepticism of higher education• Increased potential for school closure• Increased cuts to programs, faculty positions, employee benefits, and other budget items• New efforts to maximize resources

State-level budget shortfalls have led to cuts in higher education funding.

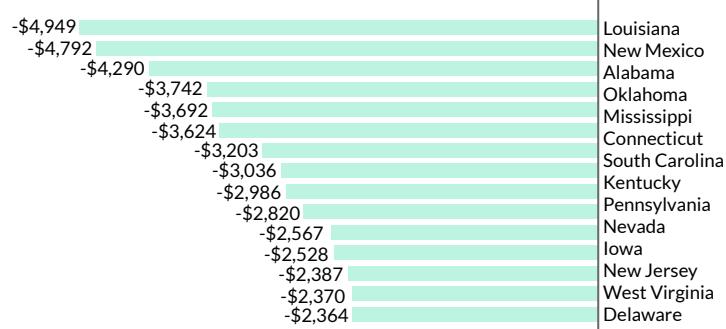


Driver

Impact

- Only CA, HI, WY and ND are spending more than they did in 2008 before the recession..
- 45 states spent less per student in the 2018 school year than in 2008.
- The average state spent \$1,502 per student in 2018 (16% less than 2008).
- Overall state funding for public two- and four-year colleges in 2018 was more than \$7 billion below its 2008 level, after adjusting for inflation.

State funding for higher education per student in 2018, compared to 2008



Middle 25 states' funding differences range from -\$2,364 to -\$306, with **Idaho ranking 31st at -\$2,015**.



Source: Center on Budget and Policy Priorities, Inside Higher Ed



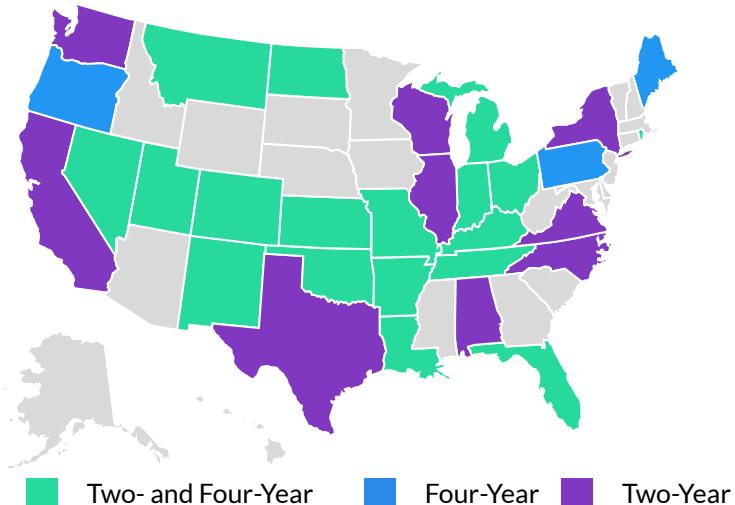
Driver

Impact

More than half of states have adopted new models for distributing their increasingly limited resources for higher education.

State funding for colleges has historically been based on student enrollment. As states look to increase postsecondary attainment with shrinking funds, they have begun experimenting with outcomes-based funding formulas, which tie a percentage of base or bonus funding schools receive to predetermined success and equity metrics.

- Popular metrics against which institutions are measured include time to degree, retention rates, and graduation rates, with a particular focus on the success of underrepresented students.
- The share of state funding tied to outcomes ranges from 3% in Arkansas to 100% in Ohio.
- In 2018, the Idaho State Board of Education created a working group, which includes CWI, that has been developing a funding formula designed to incentivizes degree and certificate completion.



Source: New America, Third Way

Not only is public funding declining, but the cost to deliver education is increasing.

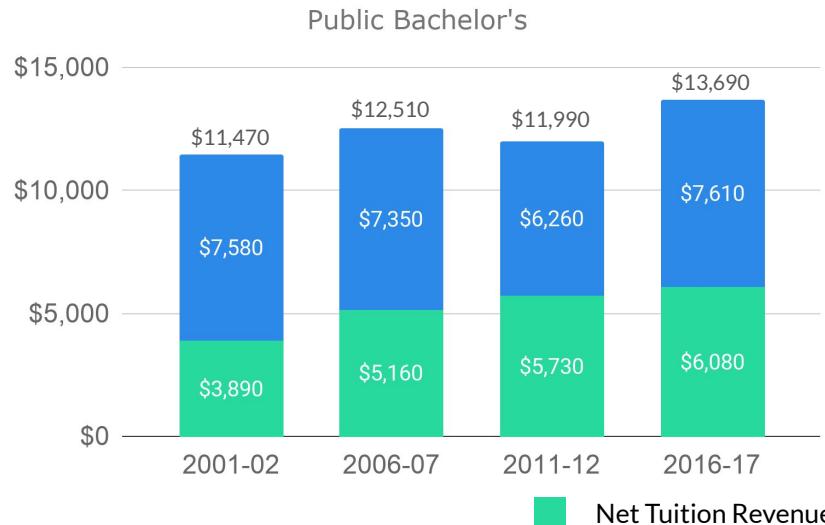


Driver

Impact

Over the past 20 years, expenditures per full-time enrolled (FTE) student have risen across the board. In 2016-2017, tuition covered 35% of the education and related expenditures per FTE, up from 25% in 2001-2002, signaling that institutions are more tuition-dependent.

Education and related expenditures per FTE student (in 2016 dollars)

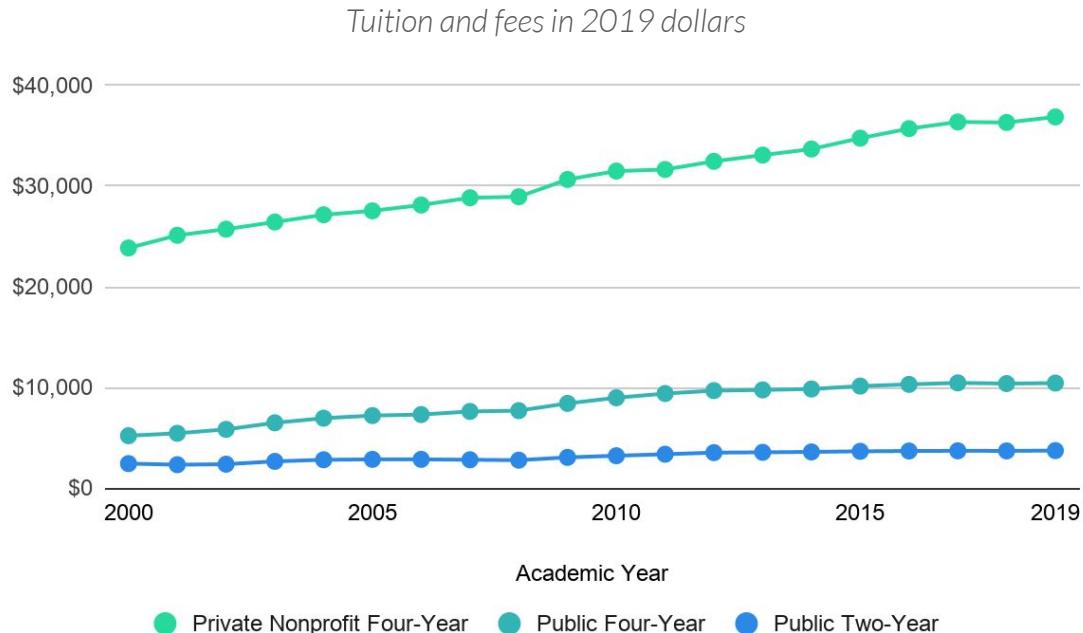


These rising costs and declining funding have fueled spikes in tuition.



Driver

Impact



- In 2019-20, Idaho's average published tuition at two-year colleges was \$4,192 per year, above the U.S. average of \$3,730.
- CWI charges tuition lower than the state and national average: \$3,336 per year.
- Since 2014-2015, tuition in the state has risen by 4%, including a 2% decrease from 2018-2019 to 2019-2020.

The building financial pressure on colleges has been exacerbated by COVID-19.

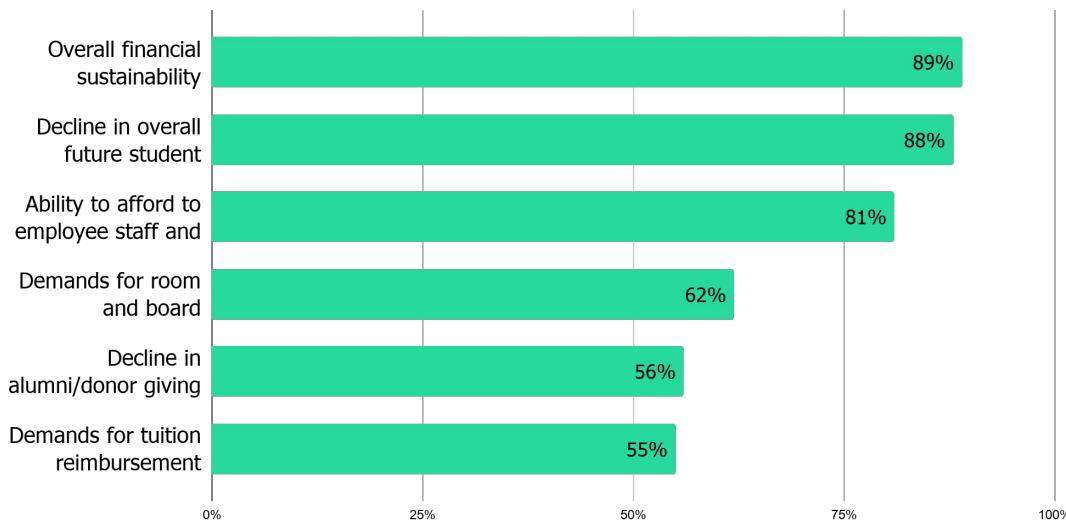


Driver

Impact

Institutions' greatest concerns at the moment are related to their ability to sustain their financial stability through this uncertainty caused by COVID-19.

Percentage of institutional leaders who rated themselves "somewhat" or "very" concerned about an issue resulting from COVID-19



Colleges aren't the only ones affected; the rising costs of college are forcing many students to rely more heavily on loans.



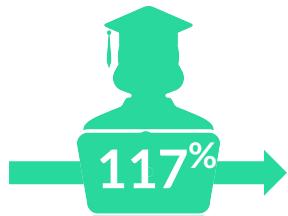
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Impact

	1970s	2010s	Percent change
Student & family responsibility	33%	>50%	66%
State support	60%	34%	-43%
Federal support*	7%	<16%	228%

*Federal funding is smallest by actual dollar amount.

2009
\$675 Billion
in U.S. student debt



2018
\$1.46 Trillion
in U.S. student debt

- \$27 billion in debt is accrued every year by students who leave higher education without earning diplomas.
- Between the 2013-14 and 2017-18, **CWI student borrowing declined by \$21 million**, with roughly similar FTE counts. CWI's affordability truly is an asset in the Idaho higher education market, both as a standalone option and a transfer pathway.

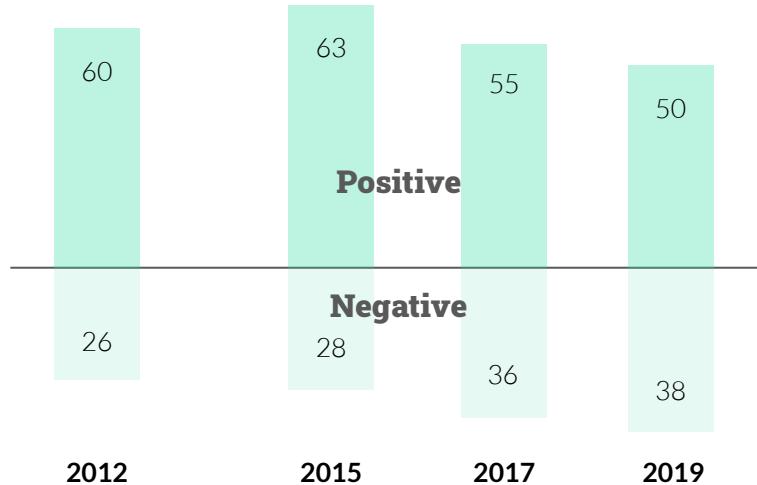
The increasing costs to attend college have contributed to growing skepticism of higher education across the country.



Driver

Impact

Percentage of Americans saying colleges and universities have a positive / negative effect on the way things are going in the country



- The share of Americans saying colleges and universities have a negative effect on the US has **increased by 12 percentage points since 2012**.
- Among adults who believe higher education is headed in the wrong direction, **84% cited the high costs of tuition**.
- Students not getting the skills they need for the workforce is the second most popular reason cited by those with a negative perception of college.

These financial stresses on schools are pushing them to innovate, merge, or close at an accelerating rate.



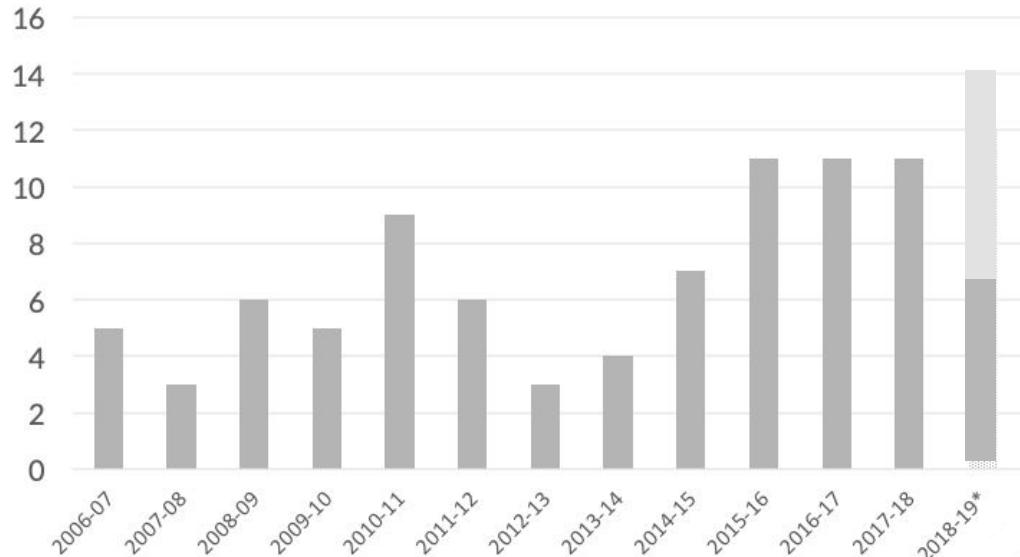
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Impact

Economic challenges lead to cuts in operating budgets, which means cuts to benefits, services, job openings, and even in some cases existing staff and faculty.

As the country and the world enter a new financial crisis in the wake of **COVID-19**, we anticipate a potential catalyst of this trend.

Annual Number of US Higher Education Institution Closures



*7 schools in 2018-19 merged with another school as opposed to closing

Public schools have made cuts to avoid closure and temper financial pressures.



Driver

Impact

- The decrease in state funding in recent years has led to cuts in academic staff and programming at many institutions.
- Many of the cuts made to programs and staff in 2008 have remained in place.
- Most public schools lack significant endowments or other funding sources, which places a strain on current resources.



The Kentucky Community and Technical College System **Eliminated 191 faculty positions** and 315 staff posts, laying off 170 employees and eliminating 336 vacant positions

The University of Florida **Cut 261 positions** for full-time tenure and tenure-track faculty while adding 234 part-time and non-tenure track positions, mirroring a national trend toward using adjunct instead of tenured professors

New Mexico State University Reduced employee health services and other benefits in addition to **eliminating 120 positions** to lower costs in response to the recession

Colleges are identifying ways to maximize existing and shared resources to stay sustainable.



Driver

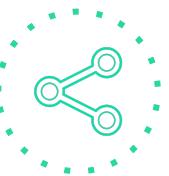
Impact

As public funding decreases and institutions seek to diversify their revenue beyond tuition, schools are **exploring alternative sources of revenue** and ways to maximize their limited resources more efficiently. Two approaches are gaining particular popularity.



Public-private partnerships (PPPs) are collaborative engagements between two or more sectors to improve the work of the two.

- Add to an institution's services and offerings through partnerships with an external sector.
- Create new opportunities for revenue while alleviating financial and political pressures.



Shared services models move services from being embedded in one institution to instead move to (and in some cases outsourced to) an entity that serves multiple institutions.

- Enable institutions to focus on their academic core by paying outside organizations for necessary back-end services,
- Often includes basic business functions and back-office technology.



“

We've started to see real traction with community college players that proactively sought out partnerships with other, complementary providers”

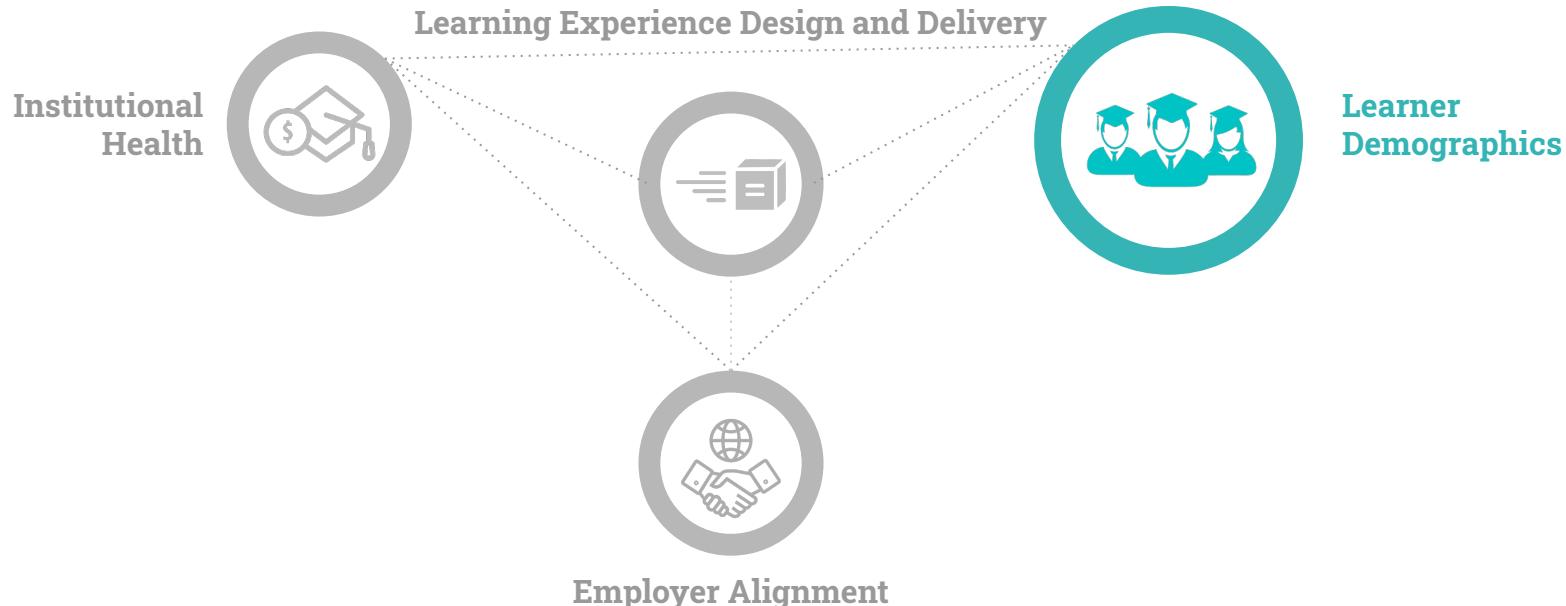
in the space.

- Anne Kauth, formerly of Foundry College



Trends in Learner Demographics

The learners of today and tomorrow represent a greater diversity of identities, presenting new opportunities for institutions to adapt and advance to serve them.



Key takeaways about learner demographics for CWI:



Traditional higher education wasn't built to serve all learners, but institutional leaders of tomorrow will design for diversity. The population of students enrolled in higher education today is increasingly diverse in multiple ways, creating opportunities for schools to broaden the value they can add to learners and communities.



In the knowledge economy, higher education is a lifelong engagement. Colleges prepared for the opportunity can serve growing adult learner population who will require additional learning and credentialing throughout their careers.



Growth in Idaho positions CWI well to serve the state and the Treasure Valley. As a school located in a state experiencing some of the highest population and job growth rates in the country, CWI likely will have increasing opportunities to serve students and communities in the region over the coming years.

Trends in learner demographics are organized by drivers of change and the resulting impact of those forces:



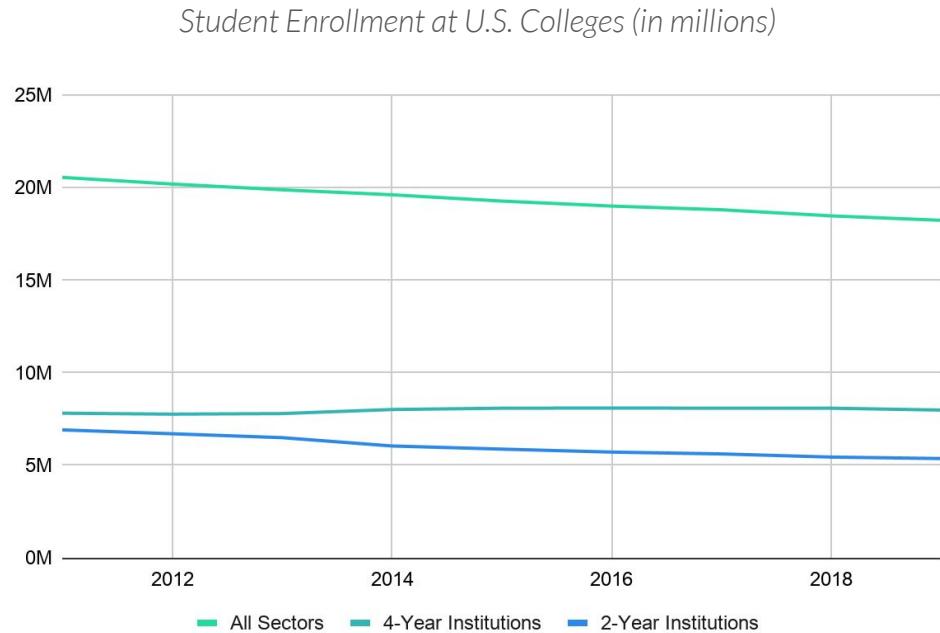
Drivers

- Decreased college enrollment
- Plateauing international student population
- Shifts in population across the US
- Potential decrease in the distance students are willing to travel for education

Impacts

- Increased diversity in population pursuing higher education
- Increased number of “post-traditional” learners
- Increased efforts to develop offerings and formats for these “post-traditional” learners

Nationally, college enrollment has steadily declined over the last decade.

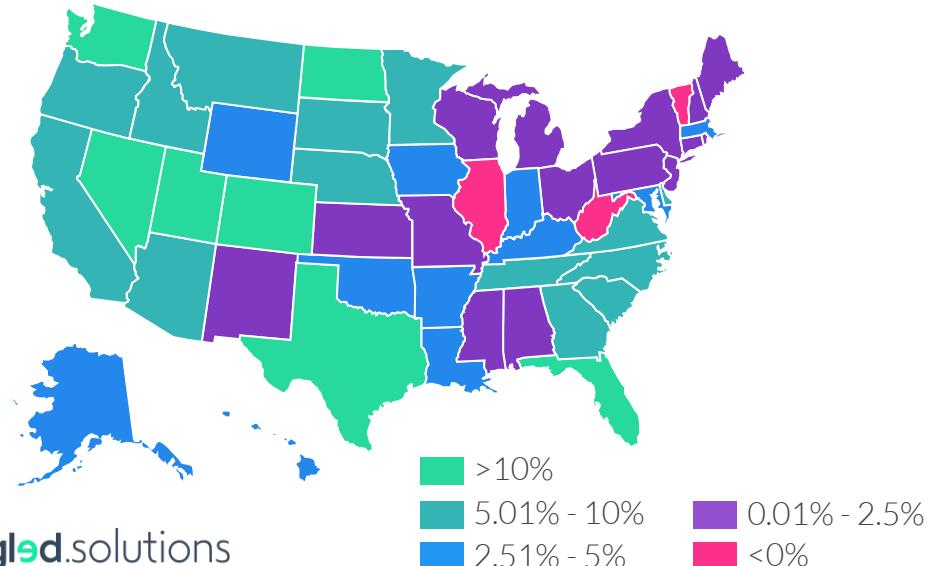


- Since 2011, **college enrollment is down 11%**, with every sector feeling the decline. In fall 2019, there were 250,000 fewer students enrolled in college than in fall 2018.
- The economic recovery from the Great Recession (2008) is a key factor in the decline of enrollment since 2011. As the economy recovered, more people entered or returned to the workforce.
- CWI has seen growth** over the past decade as the first comprehensive community college in the region. If it wants to continue its trajectory, it needs to become more strategic in its efforts to grow and meet the needs of learners, particularly adults, in the upcoming recession.



Despite enrollment declines, some regions are experiencing population shifts that will drive growth in their college-going population in the coming years.

Projected growth in college-going students between 2018 and 2029



- The population of the United States is **shifting toward the southeast and west** regions of the country.
- By 2029, researchers project a 10%+ reduction in college enrollments nationally; however this trend is expected to impact the northeast region disproportionately.
- Idaho's projected growth is largely attributed to in-migration from other states and concentrated in the Boise area, which is promising for CWI.

Regional population growth is key for institutions, as students often stay close to home for school.



Driver

Impact

Though larger universities seek to enroll increasing numbers of out-of-state students who pay higher prices and bring geographic diversity to the campus, a majority of students still opt for educational experiences that keep them close to their communities. This trend may increase in popularity in the near-term in light of the global pandemic.



of online students attend school **within 50 miles from where they live.**



of first-time degree seeking Idahoan high school graduates attend college in-state



of the largest 100 public universities in the U.S. saw an **increase in their share of in-state freshmen.**

The number of students at institutions of all types who study close to home may increase in the wake of COVID-19.

Students face increasing uncertainty about a smooth transition back to campus and a start-and-stop on-campus experience in AY 2020-2021.

This uncertainty, alongside travel and immigration restrictions and other pressures, is leading students to increasingly consider local options that will allow them to stay home.

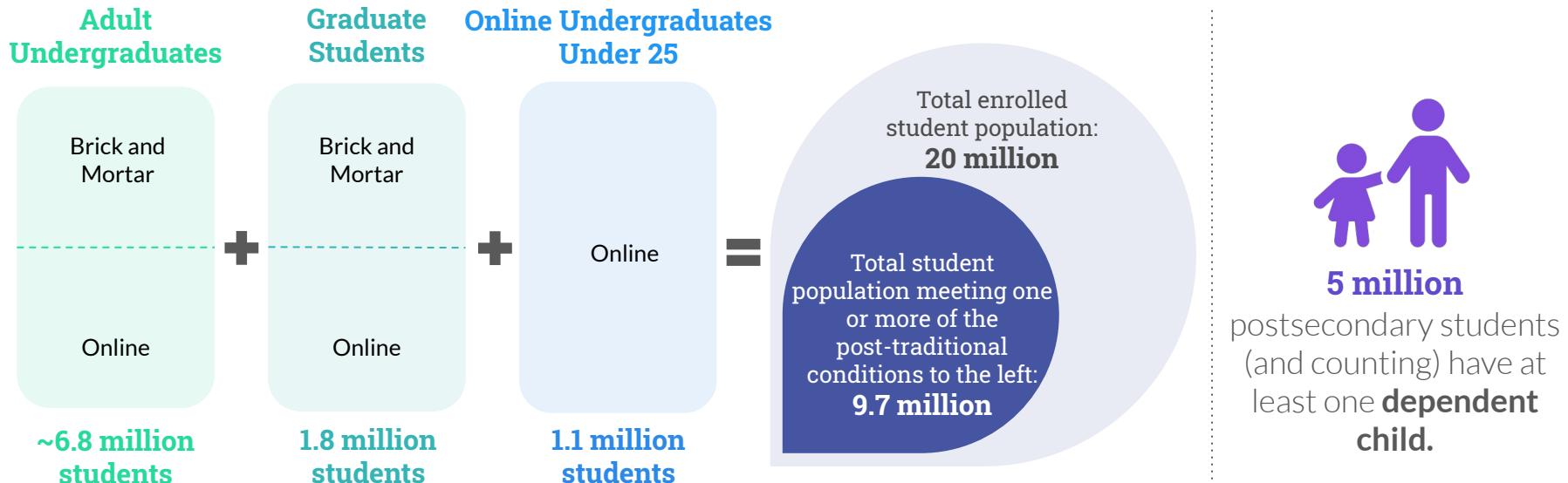
"Post-traditional" students make up at least half of the student population.



Driver

Impact

College-going students that are 18- to 22-year-olds and living on campus without dependents no longer reflect the majority of today's students who are **increasingly older, living off-campus, studying online, working, and parents**. This majority has historically been community college's target audience, and continuing to serve them well is not only a key value-add of two-year institutions, it's now increasingly a competitive advantage.



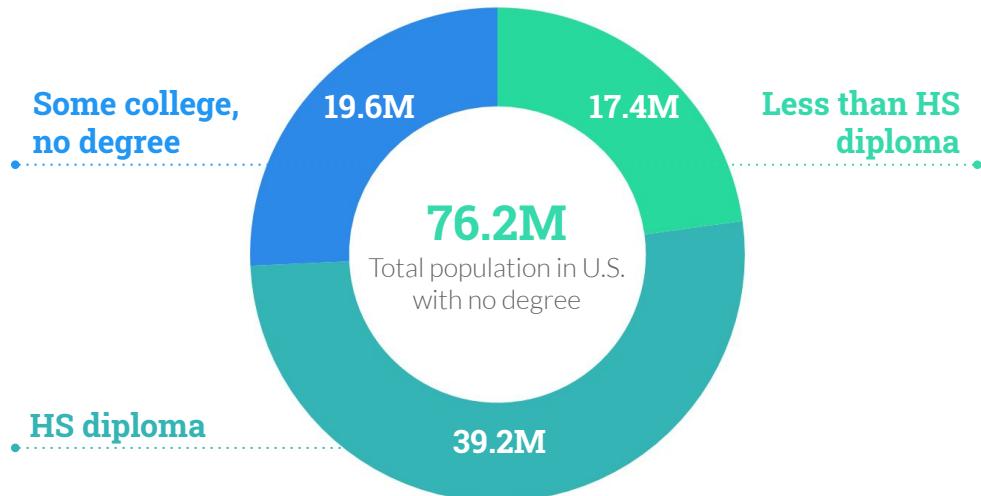
Yet adults without a college degree rarely benefit from government education and training spend.



Driver

Impact

U.S. adult population with no degree
and making less than \$22.5K per year



- American postsecondary institutions, government agencies, and employers spend approximately **\$649 billion annually** on postsecondary education and training.
- Of that, colleges and universities spend **63% on formal education**.
- Of the \$177 billion spent by employers on formal training, **58% is spent on bachelor's degree-holders**
- Only about 7% of total philanthropic spending in the US goes toward **training and education for non-college educated workers**.

College student populations are increasingly diverse, but outcomes remain inequitable.



Driver

Impact

Historically underrepresented college student populations, particularly first-generation students and students of color, are accessing college at increasing rates. However, **inequity of outcomes persists** between these students and their more privileged peers, leaving opportunity for institutions to strive to better meet their unique needs and build conditions that set them up for success.

Students of color constitute over **45%** of the college student population



White and Asian-American students earn a college-level credential at a rate about **20 percentage points** higher than Latinx and Black students do.

56% of undergraduates nationally are first-generation college students



90% of low-income, first-generation college students don't graduate on time



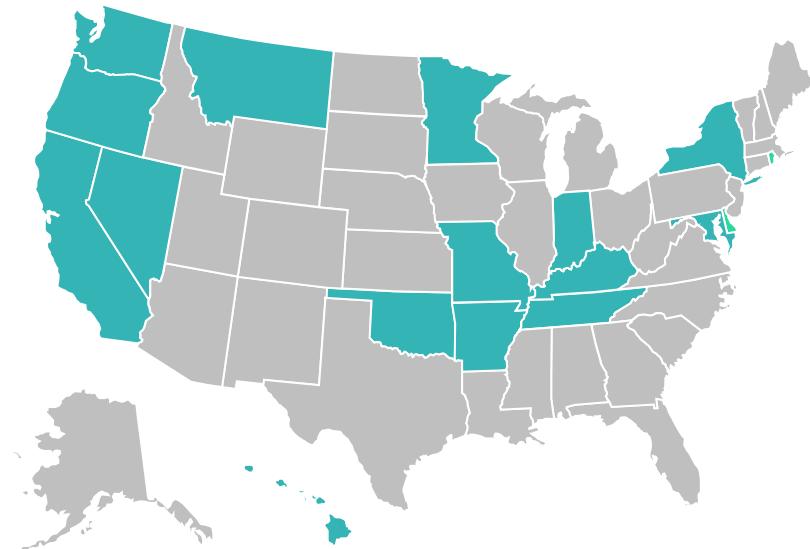
Efforts to make community college free seek to improve access for marginalized students.



Driver

Impact

Funded primarily by states, free community college offerings are being leveraged to get more students through the door by easing financial barriers and increasing awareness around the affordability of community college.



- **17 states offer some form of “free” community college**, but the opportunity tends to be quite restrictive; for example, some states will only pay for financial need unmet by all other sources, including loans.
- The **maximum Pell Grant fully covers tuition at most colleges**, so some argue that community college is already effectively free for low-income students.

An increasing share of community college enrollments are high schoolers, strengthening K-12 access to college.



Driver

Impact

Dual-enrollment and dual-credit programs enable high school students to complete college-level coursework for free or at a deep discount. This allows prospective college students to complete their postsecondary degrees faster and more affordably while meeting K-12 requirements. Institutions receive tuition and develop relationships with local and regional students who may someday enroll directly into their college.

↑ 122%

↑ 14%

Community college enrollment for part-time students who are younger than 18 more than doubled between 2001-2015 to more than 635,000 students.

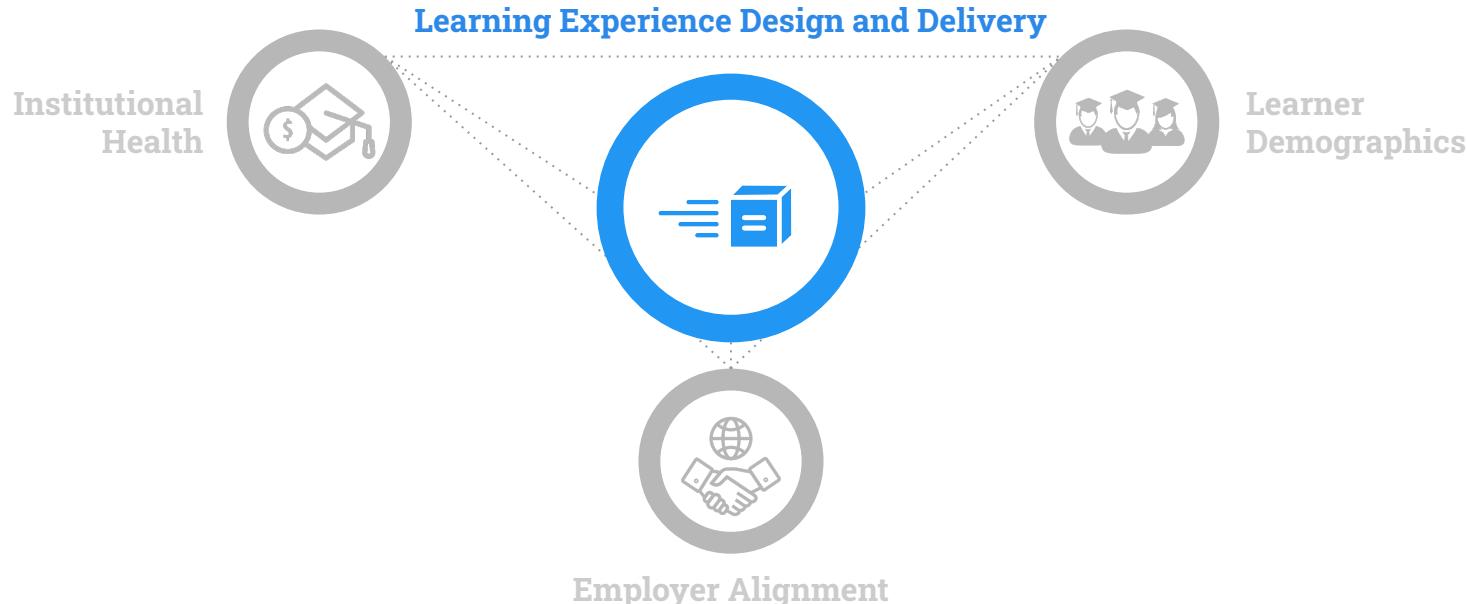
Comparatively, community college enrollment overall only increased 14% in that period from 2001-2015.

- Dual-enrollment and dual-credit has experienced considerable growth over the previous decades, even over traditional community college enrollment growth.
- Dual credit students make up approximately **60% of CWI's 2018-19 academic enrollment**.
- Only **13% of dual credit students transition to a CWI program within 1 year of graduation**, signaling that the institution may be missing significant enrollment growth without a robust pathway for these students.

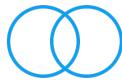


Trends in Learning Experience Design and Delivery

How students access and engage with learning is changing, as are institutions seeking to leverage these improvements to set students up for greater success.



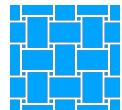
Key takeaways about learning experience design and delivery for CWI:



Community colleges are ideal institutions to maximize the potential of hybrid learning. The unique combination of students that these institutions serve with the connectivity these schools have with the community make for the right environment for students to pursue the convenient learning they seek in proximity to their community.



Improving completion and transfer outcomes is dependent on a coordinated, cross-institutional effort. Examples such as holistic student support, Guided Pathways, and remediation redesign are all heavy lifts for an institution to implement, engaging stakeholders from across the school to do effectively, but present major rewards in student success.



If CWI is able to provide a seamless user experience to students, it will be more likely to be chosen by prospective learners. Schools should enable strong completion outcomes as well as ensure that students are satisfied with the journey to that learning milestone, as both are critical for today's learners when they select their learning provider. This includes, for community colleges, the pathways between their institution and partner universities.



Trends in learning experience design and delivery are organized by drivers of change and the resulting impacts of those forces:

Drivers

- Increased popularity of distance education
- Increased broadband access in the US
- Increased learner expectations

Impacts

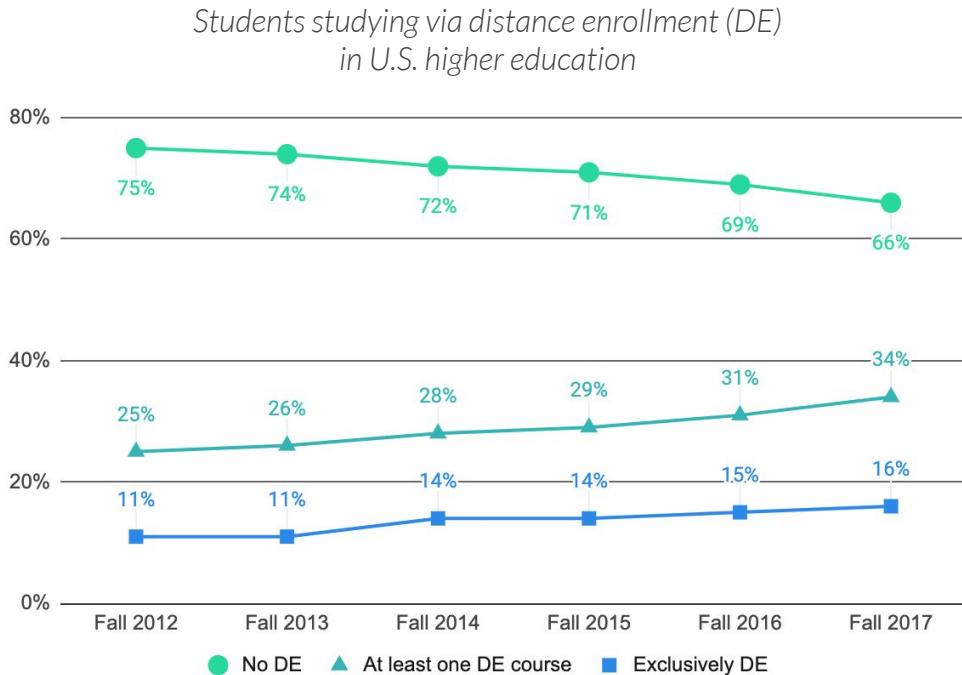
- Increased positive perception of online learning and credentials
- Increased popularity of and emphasis on hybrid education
- Increased integration of student success supports
- Increased connectivity between community college and the universities to which students transfer
- Decreased use of traditional remediation

Students are choosing distance education more often.



Driver

Impact



- Distance education courses are those in which instructors and students are not in the same location. Historically, this meant correspondence courses, including those with CD or DVD instruction; today distance instruction is delivered primarily online, either **via live, interactive conferencing or recorded videos**.
- The number of distance education students in the US grew by 9 percent from fall 2012 to fall 2017, to represent **34% of all students**.
- 14.7% of students are taking distance courses only, and 16.7% of students are taking a combination of distance courses and courses on campus.

A majority of distance education enrollment is concentrated within a small number of institutions.

Almost half of distance education students are **concentrated in just 5 percent of institutions**, including Southern New Hampshire University, Western Governors University, and Walden University.

That does not mean that CWI should neglect its distance or remote learning portfolio, but rather that it must explore ways to maximize its embeddedness in the communities it serves.



Driver

Impact



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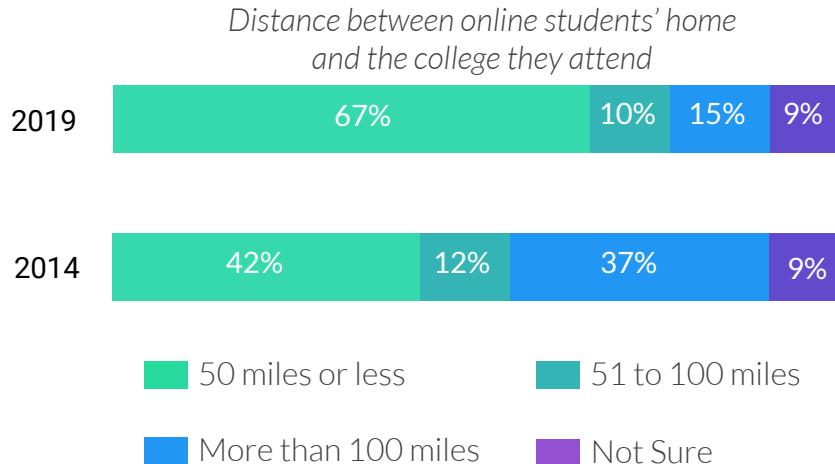
In the online space, there are currently better providers than community colleges. But a part of that is because **community colleges add value through their physical proximity to, and integration with, the community they serve.**”

- Lou Albert, Professor of Practice at Arizona State University and former President of Pima Community College



However, an increasing number of distance education students are choosing institutions close to home.

The growing number of schools offering distance education programs provides students with more options closer to home.

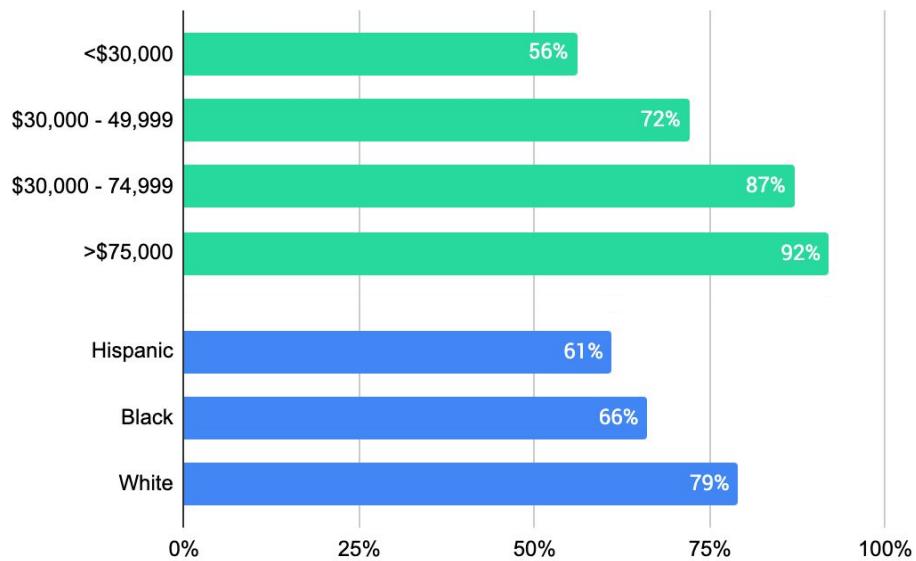


- The proportion of students studying fully online who are enrolled within 50 miles of their homes has **risen from under half to fully two-thirds**.
- In 2019, 44% of online students attended a college that was 25 miles or less from their home.
- In a large state serviced by only four community colleges, **CWI is the closest school** for many students outside of its 100 mile radius



Broadband access is a barrier to distance education for low-income, racially marginalized, and rural student populations.

73% of all Americans have access to broadband, but racially marginalized and low-income populations are less likely to have broadband service at home.



- 63% of rural Americans have a broadband internet connection at home, up from about 35% in 2007; **79% of Idahoans have access to broadband 100mbps or faster**
- Rural Americans are also less likely than those in urban or suburban environments to have multiple devices that allow them to go online
- **COVID-19 has compounded the need** for reliable internet access as social distancing has forced schools to transition to remote learning for the near future.

Online education is increasingly accepted and valued by students and employers.



Driver

Impact

- Online options are gaining traction globally.
- Online providers, such as Coursera, are providing fully online master's degrees for **a third of the cost** of on-campus versions.
- Stackable online credentials are becoming more popular.

Effectiveness of Online Education

71.4% of academic leaders rate “the learning outcomes in online education as the same or superior to those in face-to-face instruction.”

Online as an Option for First-Year Students

Arizona State University allows students to take the first year online as part of their “Freshman Academy.”

Stackable Credentials

Several programs are also allowing students to “test” degrees by taking courses that can eventually be “stacked” into a degree, thus lowering students’ risk.

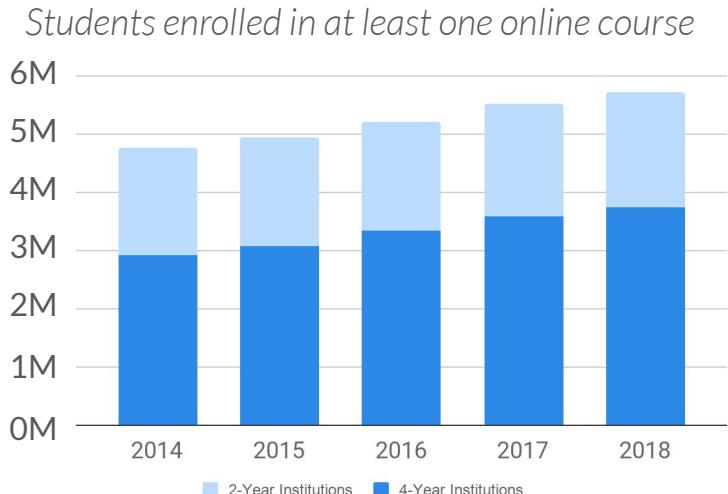
Trends point to growing interest in hybrid education.



Driver

Impact

34% of all students at 2-year institutions took at least one course online in 2018



“The future of online learning is bricks and clicks.”

-Michael B. Horn



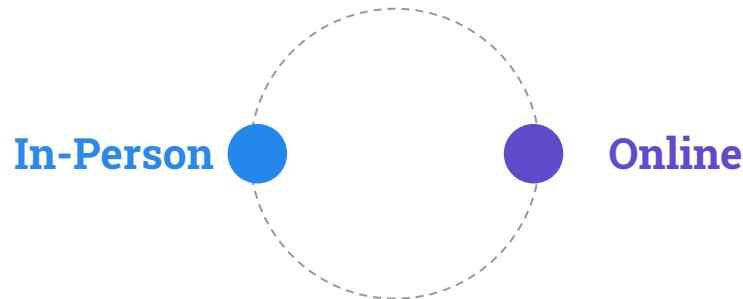
Future Trend: As the CTE market matures, we should expect it to follow a similar “bricks and clicks” strategy.

Hybrid education is proving to be effective for faculty and learners.



Hybrid learning is growing in popularity among faculty: While only 12% of faculty respondents to Campus Technology's annual survey reported believing that purely online courses hold promise, **42% responded that blended or hybrid courses hold promise.**

A growing body of literature suggests that hybrid learning is much more effective than online learning, supporting wider-spread adoption of these learning environments. Compared to online education, hybrid learning provides a **richer learning experience and a higher level of engagement**, as students have the convenience of online without losing the community and association provided by in-person opportunities.



“ Learning has traditionally been defined inside the classroom, but modern learning should happen everywhere and all the time. ”

- Zachary Hodges, President of Houston Community College Northwest

Today's learners expect a high-quality user experience to successfully navigate school.



Driver

Impact

Institutions face pressure to provide students with a seamless user experience akin to that which they are provided in other aspects of their life. At the moment, **students navigating institutional offerings, and seeking support resources in particular, often bounce between complex and disconnected policies, offices, websites, contacts, and more.** This process is very unlike any other they are encountering in their day-to-day lives, leaving them at best fatigued by the process and, at worst, unable to make progress towards their educational goals. Not to mention their dissatisfaction with their learning journey as a result.

To best meet students' needs and, perhaps more significantly, deliver *satisfaction* to students with their end-to-end experience with a school, institutions are exploring ways to better curate and facilitate access to resources. **Designing a high-quality user experience with limited friction for students navigating college will be a significant differentiator for institutions over the coming years.**



One step institutions are taking is shifting to more holistic student support models.

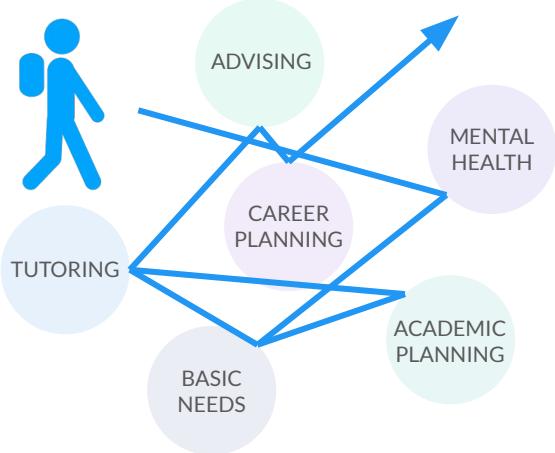


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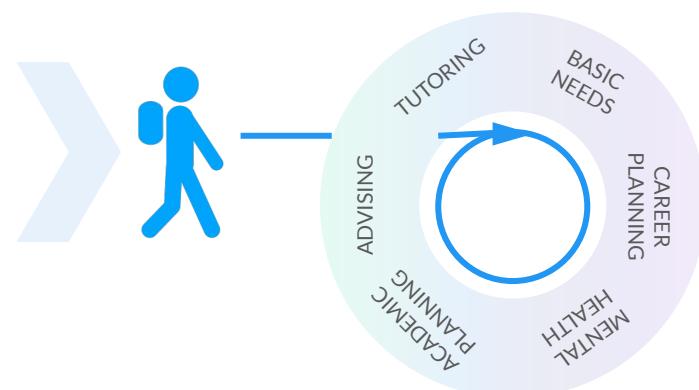
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Integrating support services and improving connections between resources on campus are ways in which institutions are improving student outcomes. Investing in this approach is the key to increasing completion rates, especially at community colleges.

A typical student support experience requires students to bounce between **disconnected services and resources**.



An **integrated, holistic student support experience** builds connective tissue between resources to form a central support strategy.



“

Community and technical colleges serve as the gateway for an increasingly non-traditional student population...[and] have the ability to redesign the student experience and create learning environments that remove systemic barriers and help students attain economic mobility

”

- Shaunda Davis, Executive Director of Holistic Student Supports at Achieving the Dream

Guided Pathways is a way to redesign the student experience to improve success.



Driver

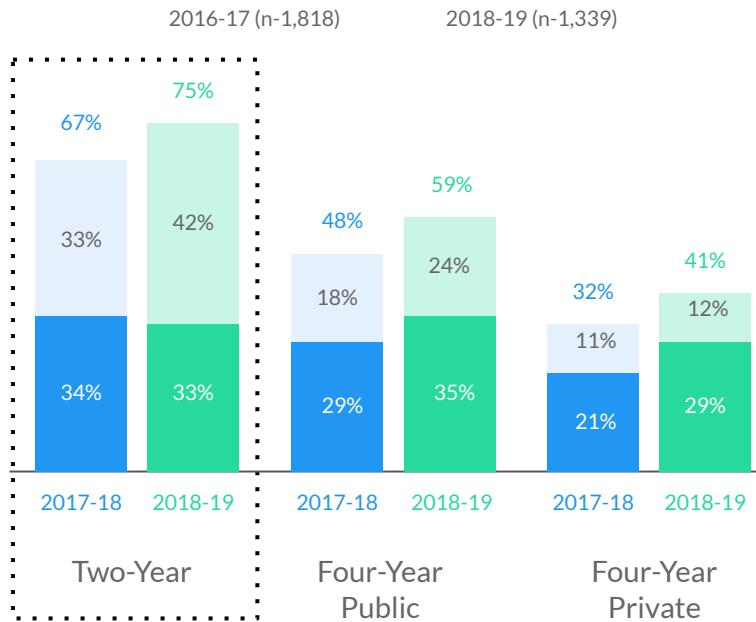
Impact

Guided Pathways is a comprehensive reform model that transforms the entire college to focus on student success. The model is built on developing **clear pathways to student end goals** and supporting students as they choose and complete the appropriate path that aligns with their interests and skills.

- Initiatives include degree pathway maps, early alert systems, and connection to careers and transfer opportunities through collaboration of student services, admissions, IT, and marketing.
- **350+ community colleges** have committed to undertaking large-scale guided pathways reforms.
- Since 2018, an Idaho State Board of Education workgroup has been working to develop state-level strategies to support guided pathway reforms.

Guided Pathways Adoption Across All Departments of College

Guided Pathways Adoption for Some Departments or Colleges



Source: Tyton Partner, IPEDS

Changes to remediation are alleviating barriers to retention for at-risk students.



Driver

Impact

Traditional Remediation

Traditional remediation, also known as developmental education, requires students entering college to pass non-credit bearing courses in order to build skills in Math or English before entering college-level coursework. Though it is intended to get students more prepared for college courses, **it can significantly deter college completion by using up federal funding for schoolwork that doesn't count towards a degree and by extending the time it takes to complete that degree.** This is a significant barrier to postsecondary educational equity, as students enrolled in remediation are disproportionately black, latinx, and/or from low-income communities.



Corequisite Remediation

In recent years, to address this barrier to success while still preparing students for the rigor of college, corequisite remediation has been implemented to **enable students to enroll directly into college-level courses and receive academic support alongside their regular classes, thereby avoiding costly prerequisites that do not count towards a degree.**

States like Indiana, West Virginia, and Tennessee have implemented corequisite remediation policies and have seen significant improvements for students requiring remediation as a result, nearly tripling outcomes in Math remediation compared to the national average and more than doubling outcomes in English.

“ You see, remediation, despite its intentions to prepare students for college, is **built on a foundation of low expectations for students** like myself in high school. Then students are forced to foot the bill, and we are standing up now and saying no. We can no longer suffer the consequences by the system's failure. ”

- Ramon Page, College Student at the University of Minnesota

Community college partnerships with four-year institutions are streamlining transfers.



Driver

Impact

Students looking to transfer from community college to a four-year institution face a number of barriers, including lost credits from courses that don't transfer, the financial burden of applying to and attending a four-year institution, and the pressure of relocating. To better enable students to reach their postsecondary goals, community colleges are creating more robust partnerships with four-year institutions.

~50% of all college students start at community colleges

81% of those students express a desire to earn a BA

33% actually transfer to a four-year institution

14% earn that BA within six years

Community college-university partnerships across the country vary, but typically contain some combination of the following to best deliver on outcomes for students:

- **Alignment and articulation of curricular** content to facilitate seamless transfer
- **Student support services** to promote motivation and provide information about college preparedness
- **Staff development** to promote high quality training for teaching faculty
- **Resource sharing** to promote a fiscally sound environment

CWI's corequisite remediation and university partnership efforts contributed to improved student outcomes.



Driver

Impact

Corequisite Remediation

> 90%

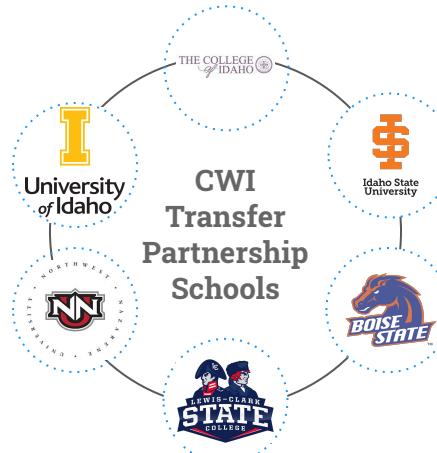
of CWI students required remediation in Math, English, or both in 2017-18

CWI leveraged corequisite remediation to alleviate considerable frictions for students hoping to complete their education efficiently and cost-effectively.

- The institution has implemented a fully scaled co-requisite remediation program for English, resulting in **success rates several times the national average**.
- However, co-requisite remediation is available on a limited basis with math courses, resulting in the **English remediation success rate being 3 times as high as Math remediation**.

University Partnerships

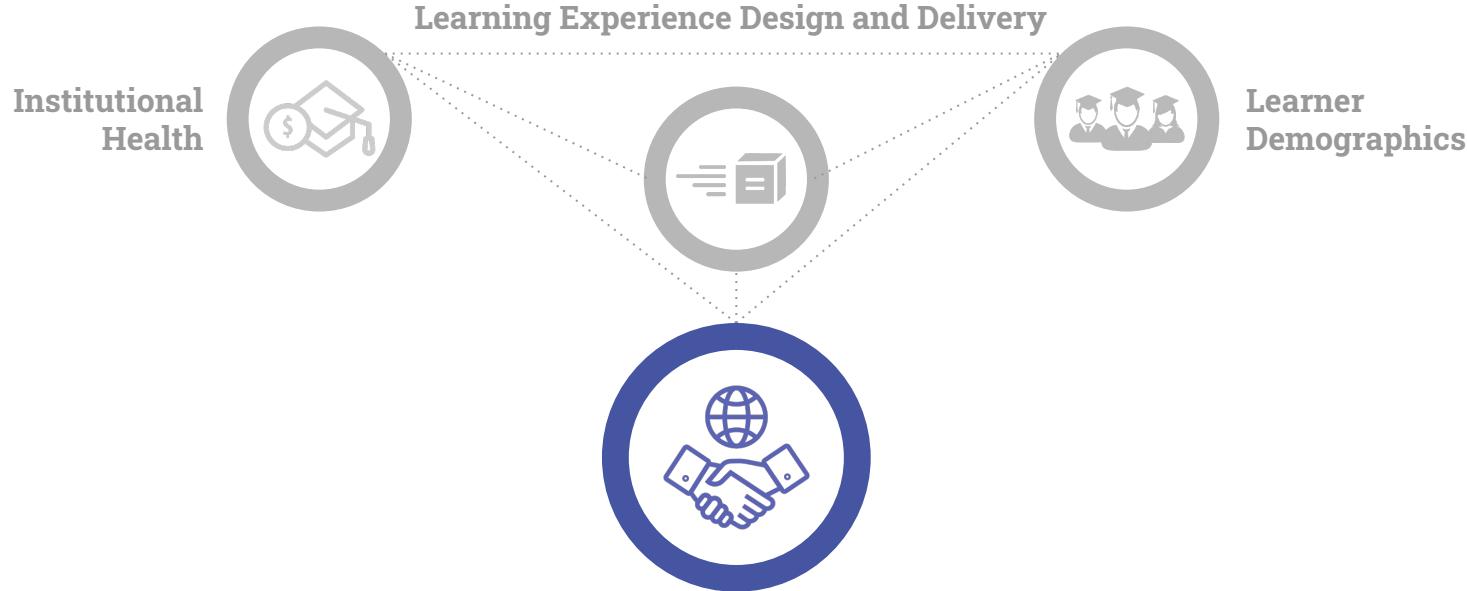
CWI is a vital enrollment and talent pipeline in Idaho, and is the **largest in-state provider of transfer students to four-year institutions** from a comprehensive community college.





Trends in Employer Alignment

The signal of credentials outside of institutions is critical to learner outcomes, inspiring deeper connections between schools and the workforce.



Key takeaways about employer alignment for CWI:



Building deeper connections, and a shared vocabulary, with employers is crucial to preparing CWI graduates to enter the workforce. Job readiness is hard to assess for employers and institutions alike, but efforts to provide additional clarity to the signal of credentials and programs will yield better employment outcomes and potentially expand pipelines to satisfied regional employers



Within traditional higher education, community colleges are well situated to respond to employer, industry, and workforce needs. For institutions with CTE programs, shorter-format credentials, and an emphasis on students' employment outcomes, strengthening the connection between educational offerings and employer demand is well aligned with existing functions and values.



Community colleges, like CWI, have emerging competitors beyond the traditional higher education space. Last-mile providers, early career enhancers, opportunity on-ramps, and learning provided by employers directly present new options to prospective learners; however, community colleges have unique benefits (e.g., proximity to local employers, the trustworthiness provided by accreditation) that they should leverage to maintain relevance in this increasingly complex marketplace.

Trends in employer alignment are organized by drivers of change and the resulting impacts of those forces:



Drivers

- Increased threat of automation in the workforce
- Misalignment between employers, higher education, credentialing agencies, associations, and employees themselves

Impact

- Increased skills gap in the workforce
- Increased number and diversity of alternative learning providers, including “early career enhancers,” last-mile providers, and employer-paid external learning providers



Much of the workforce does or will need retraining and upskilling due to automation.

In the near future, **almost all jobs will have some aspect of their work automated** and many will see the core skills of their work rendered obsolete. As such, there will be growing demand from the workforce for offerings to retrain and upskill current and prospective employees.

~32M

working-class adults are at risk of being left behind by the future of work.

61%

of U.S. jobs will experience medium or high exposure to automation by 2030, leaving tens of millions of U.S. workers in need of retraining and upskilling.

“ Closing the skills gap at scale isn’t just about 7 million unfilled jobs today. It’s about moving tens of millions of Americans **from declining or stagnant sectors of the economy to dynamic sectors** like technology and health care over the next decade. ”

- Ryan Craig, Higher education thought leader

Industry leaders do not perceive colleges to be preparing students for the workforce.



Driver

Impact

There are misaligned perceptions of recent college graduates' preparedness for the workforce, signaling a disconnect between what employers want, what learners need, and how institutions signal that they've satisfied those interests.



96%

of academic officers at higher education institutions believe their college prepares graduates for employment after school.



35%

of recent college graduates believe their undergraduate education prepared them for their job.



11%

of business leaders believe that recent college graduates are prepared for the workforce.



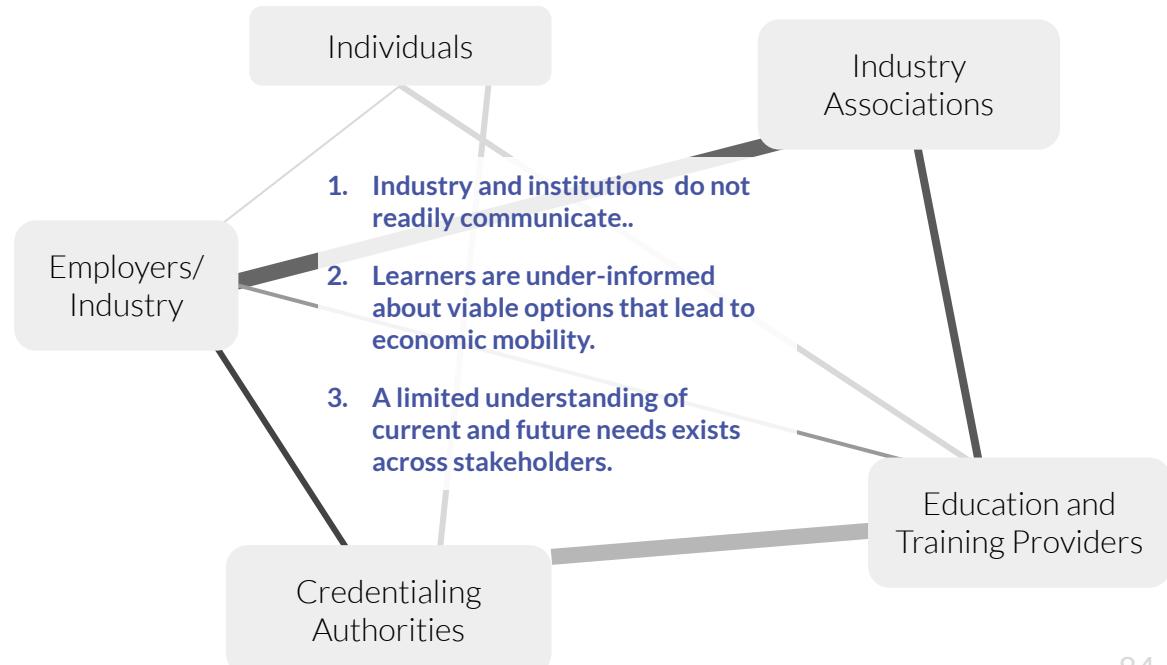
Fragmentation between college and work is contributing to the growing skills gap.

Misalignment in the workforce is not limited just to higher education and employers, and as such the chasm between what skillsets industries need employees to have and what individuals are prepared to do has grown.

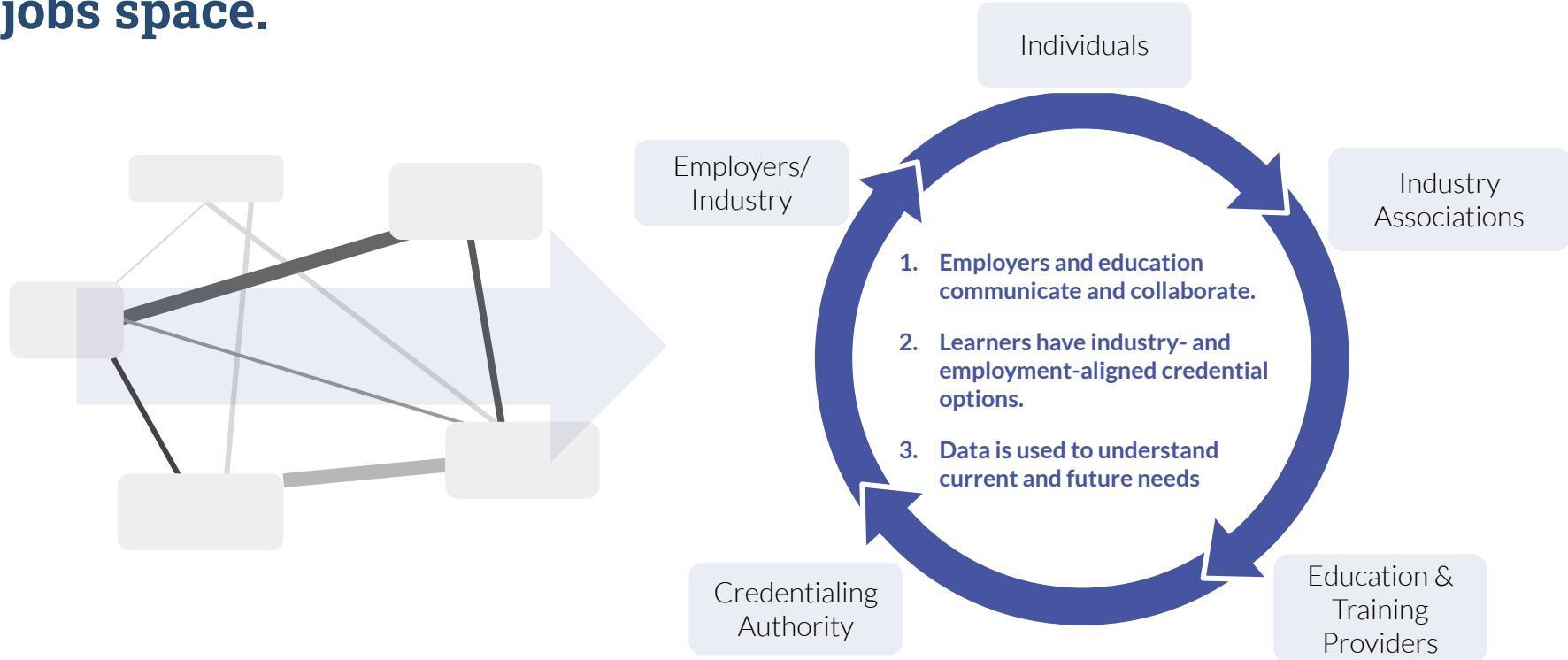


“ The future is all around a very **malleable line between the working and learning demands of an individual**. Systems need to enable that mix and blur those lines even more to truly enable lifelong learning. ”

- Dr. Parminder Jassal,
Institute for the Future



Education providers, traditional and alternative, are working to bridge gaps in this fragmented jobs space.





Community colleges have a particular responsibility to connect students with, and prepare them for, employment.

Improved career prospects is a primary motivation for students that decide to enroll at CWI. The college has been particularly successful in preparing CTE students for employment opportunities following graduation.

- 85% of CWI students cited **future career opportunities as highly important factor** in their decision to attend CWI
- 97% of CWI 2016 career and technical graduates are employed or pursuing additional education

“



The most successful community colleges find ways to improve student outcomes in terms of employment, help finance education, couple associate degree credentials with education or training, **support students in finding jobs now, and tee up a meaningful long-term career path.**

- Anne Kauth, formerly of Foundry College

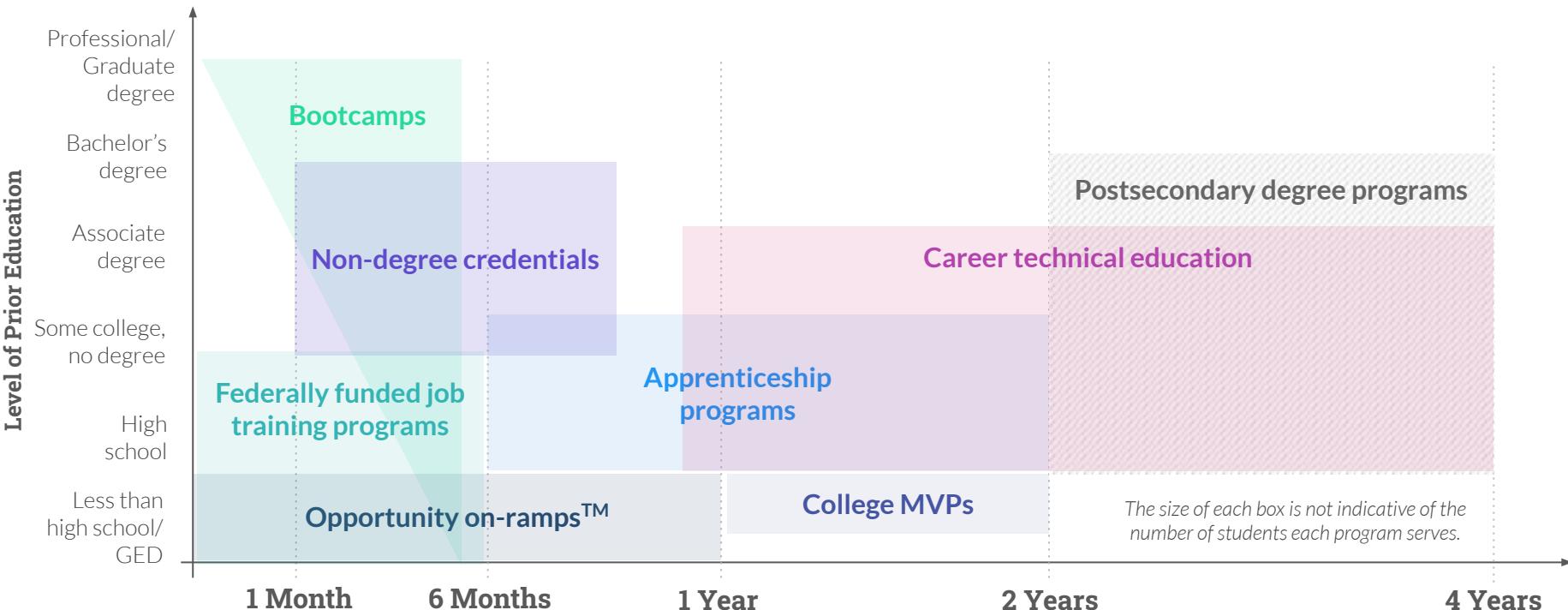
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Alternative providers offering pathways to careers are growing, varied, and complex.



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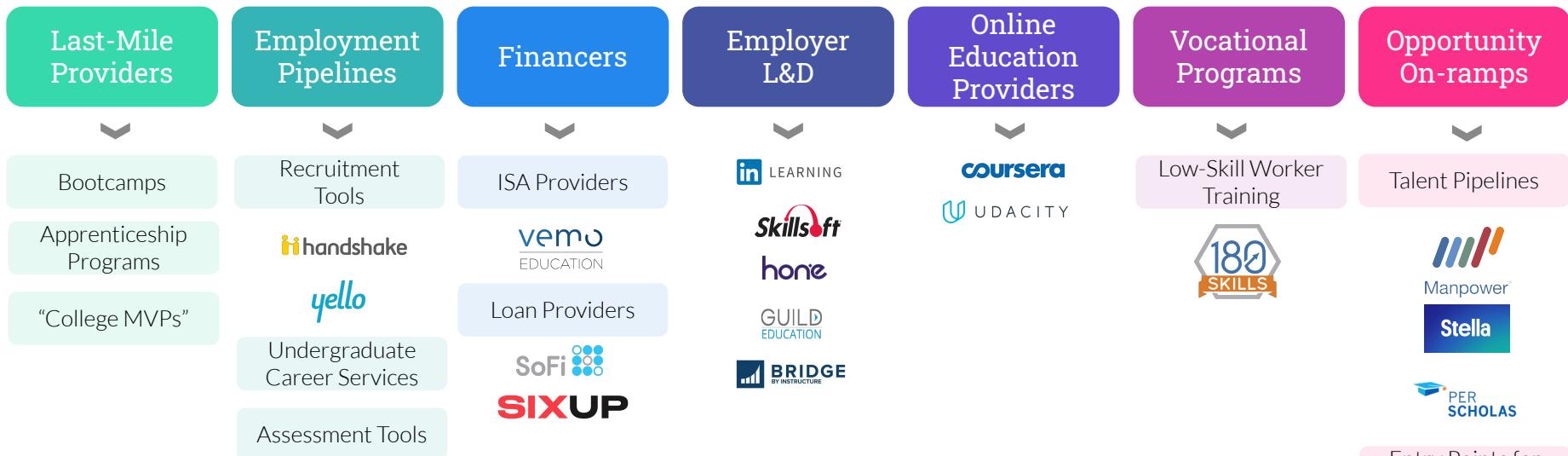
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The landscape of “early career enhancers” is diversifying, accelerating competition for traditional higher education institutions.



Emerging providers are creating new ways of addressing the aforementioned market fractures, presenting new competition to community colleges.

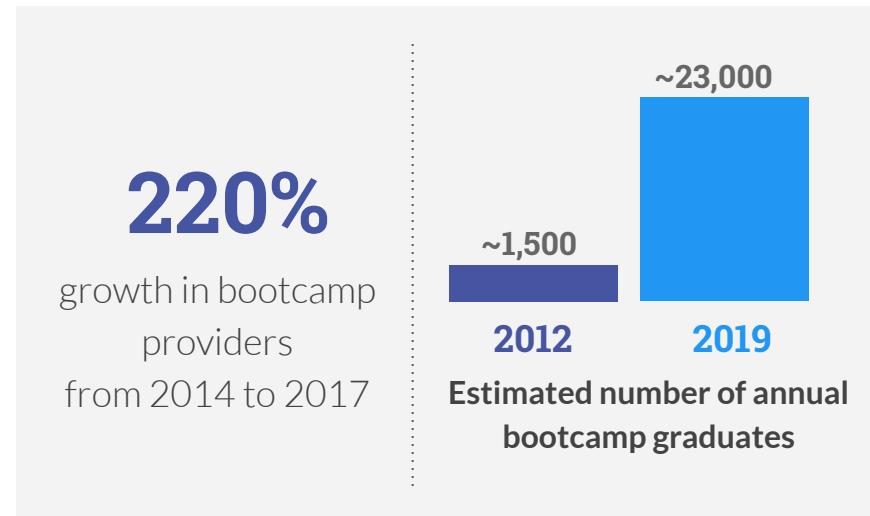




Last-mile providers target the gap between what traditional higher education offers and what employers seek.

“Last-mile providers” are a segment of the education market that provides training, education, and experiences to facilitate a more seamless connection between education and work. They have experienced incredible growth over the past few years.

- These providers, that include **bootcamps**, **apprenticeships**, and **college minimum viable products (MVPs)**, are emerging as a bridge between formal education and employment.
- The focus of these providers is equipping learners with the **technical skills** that employers need but are rarely taught by colleges and universities.
- They often have **relationships with employers** to improve job outcomes for their learners after they complete their program.



Employers are increasingly offering learning and training from traditional and alternative providers.



Driver

Impact

Employers regularly invest in training and professional development opportunities that focus on essential and managerial skills. These opportunities are often leveraged by companies as recruitment and retention tools, as employees perceive such benefits as a direct investment in their personal growth. **This positions employers as providers and curators of education offerings to employees in a way they have not been before.**

\$413B
per year

is spent by employers on **informal training** (e.g. ad hoc experiences on-the-job)

\$177B
per year

is spent by employers on **formal training** (e.g., scheduled, regimented series of learning or training sessions)

A growing number of employers are spending a significant amount of those funds on external training providers.



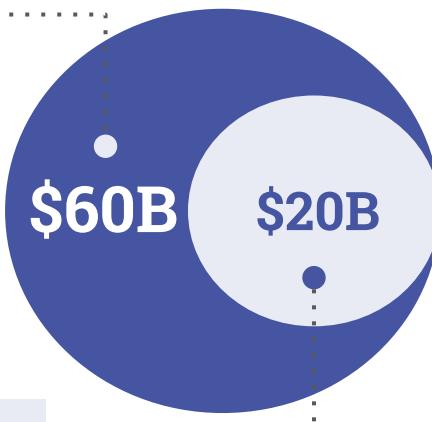
Driver

Impact

Many companies, including a growing number of large corporations like Walmart and T-Mobile, are urgently seeking to hire skilled workers amid low unemployment, particularly in information technology, health care, and other high-demand fields. As a result, some employers are getting more serious about using tuition reimbursement and other subsidies to help train and retain their employees.

Formal training through external providers, both accredited and not accredited

Formal training through external providers are scheduled, regimented series of learning or training sessions, typically administered by an assigned trainer



External Provider Market Size

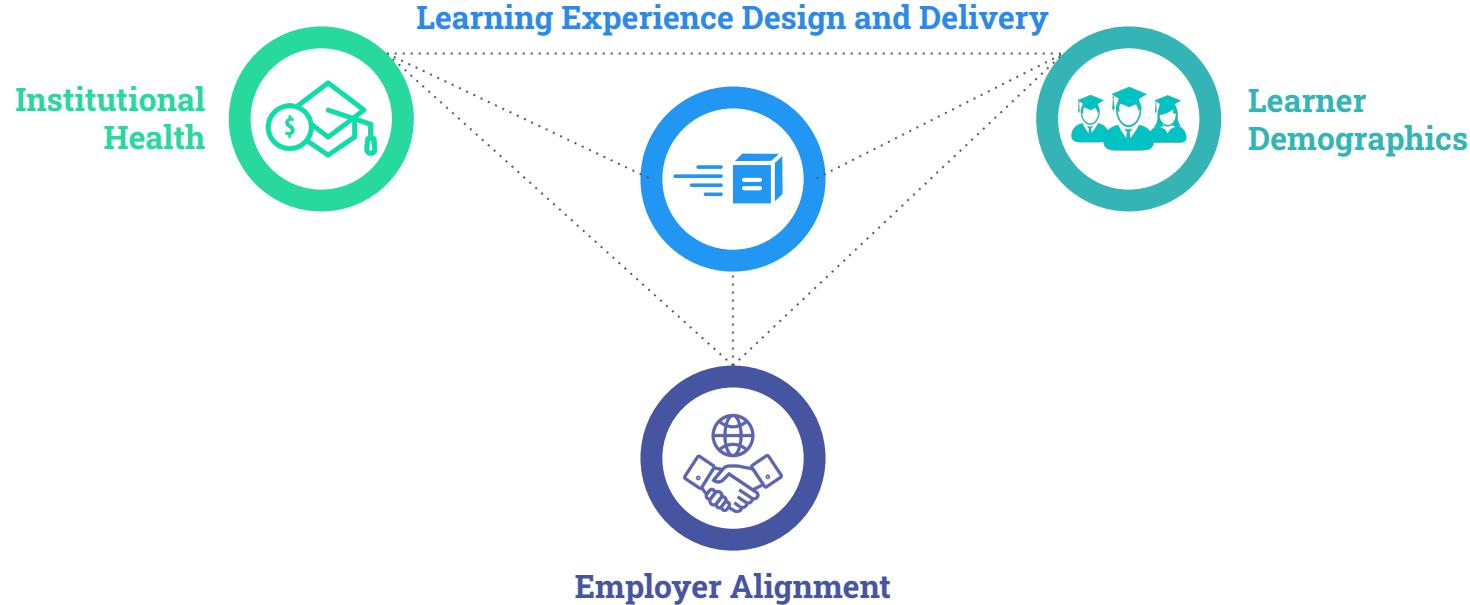
Learning benefits

Learning benefits are reimbursements offered by large companies to give employees choice in their education. The \$20B market is a subsection of the formal training (through external providers) segment. Some employers require those providers to be accredited.



Summary of Insights for CWI

As CWI looks ahead, it must consider how the institution fits into, takes advantage of, and prepares for trends in the four major factors.



Understanding key trends enables CWI to respond to, and design for, the right opportunities in the future.



Key Takeaways in Institutional Health

- Weathering the increasingly complex and challenging financial conditions of higher education requires a willingness, if not an eagerness, to change.
- Success and sustainability are hard to do alone.
- Institutions must identify ways to maximize existing resources and supplement traditional sources of funding and revenue.



Key Takeaways in Student Demographics

- Traditional higher education wasn't built to serve all learners, but institutional leaders of tomorrow will design for diversity.
- In the knowledge economy, higher education is a lifelong engagement.
- Growth in Idaho positions CWI well to serve the state and the Treasure Valley.



Key Takeaways in Learning Experience and Design

- Community colleges are ideal institutions to maximize the potential of hybrid learning.
- Improving completion and transfer outcomes is dependent on a coordinated, cross-institutional effort.
- If CWI is able to provide a seamless user experience to students, it will be more likely to be chosen by prospective learners.

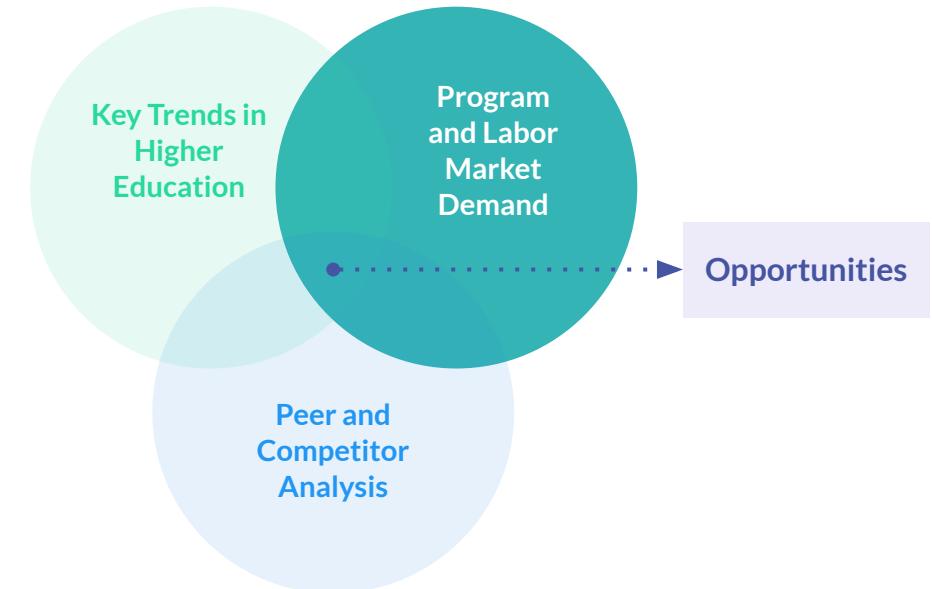


Key Takeaways in Employer Alignment

- Building deeper connections, and a shared vocabulary, with employers is crucial to preparing CWI graduates to enter the workforce.
- Within traditional higher education, community colleges are well situated to respond to employer, industry, and workforce needs.
- Community colleges, like CWI, have emerging competitors beyond the traditional higher education space.



Program and Labor Market Demand



Reviewing program and labor market demand together allows CWI to uncover the highest potential program expansions for the school.

Program Demand

Student demand for CWI associate degrees and certificates as measured by metrics like growth in degree conferrals.



Labor Market Demand

Labor market demand for associate degrees and certificate programs as measured by metrics like job growth and job postings.

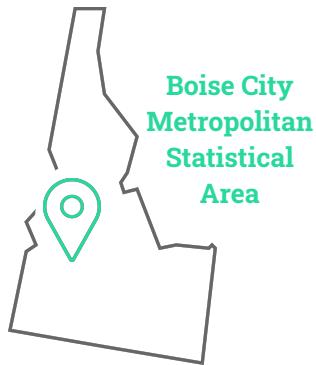
Program Recommendations

Layering results of the Program Demand and Labor Market analysis reveal recommended associate degree and certificate constellations for CWI.



Section Note: This is a selective review, not a comprehensive summary, of CWI's program and labor market demand. This section focuses on **Spotlight Programs**, selected key areas of interest for CWI in terms of significance (e.g., market share and/or degree conferrals) and growth potential.

Benchmarking CWI's performance against four geographic areas helps identify strengths and potential growth areas.



*Metropolitan Statistical Area (MSA)

State

Region

Nation



Program Demand

Key takeaways about program demand for CWI:



There's room to grow CWI's portfolio by exploring unmet program demand in Health, Business, and CIS/IT. The institution is well-positioned to develop and grow these certificates and degrees simultaneously and in ways that serve the needs of working adult learners. For instance, CWI could be the first institution in the MSA to offer Business programs in Human Resources (+11% national growth) and entrepreneurship (+22% national growth).



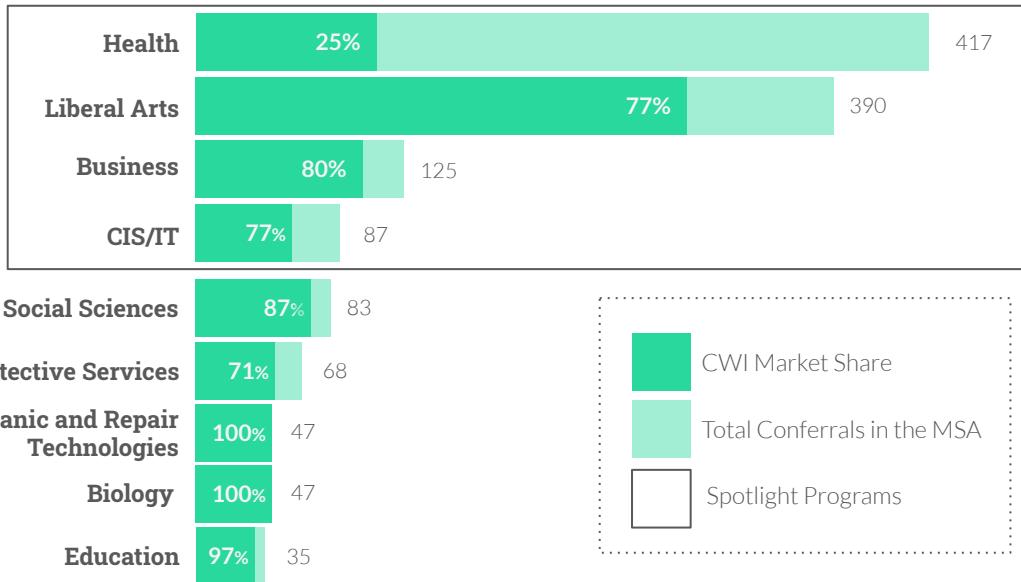
CWI can shine by differentiating itself as a transfer institution. Capitalize on your local and regional Liberal Arts dominance. Based on market share and demand, there's a strong signal that CWI is viewed as a vital pathway to 4-year institutions. CWI might consider expanding outreach as a "first choice," school, strengthening transfer and AA pathways to the program.



Significant demand growth for certificates indicates that shorter bursts of learning are desirable to students, but not equally across programs. CWI should maintain investment in dominant programs like Mechanic and Repair technologies, but acknowledge its growth limitations. Beef up investment in high-demand stackable certificates like Business and CIS/IT.

By local market share, Health, Liberal Arts, Business, and CIS/IT are degree disciplines with growth potential for CWI.

Selected associate degrees conferred in the Boise City MSA, 2018, and CWI's market share



The Entangled team used market share as a starting point to investigate program demand.

Local degree market share and conferrals suggest **CWI may have room to grow in:**

- Health
- Liberal Arts
- Business
- Computer and Information Science/Information Technology (CIS/IT)

Section Note: The “discipline” classifications in this analysis are the highest level of program grouping and correspond to the IPEDS CIP2 category. Thirty-nine disciplines are included in this analysis, excluding those that do not confer associate’s degrees or certificates.

Three key metrics guide the program demand analysis.

Proportion of Portfolio

The proportion of 2018 degree or certificate conferrals for a specific program, constellation, or discipline

Comparing CWI's portfolio against the MSA, state, region, or U.S. average can aid in identifying investment opportunities.

Areas in which CWI is underweight represent new opportunities; overweight areas are potential risks or institutional strengths to maintain.

Conferral Growth, 2014 to 2018

The change in annual degree or certificate conferrals from 2014 to 2018 for a specific program, constellation, or discipline

Above-average conferral growth rates indicate growing student demand; low or negative growth rates signal declining demand.

Differences between national and regional growth rates point to pockets of higher or lower demand.

Program Size vs. U.S. Average*

The number of annual degree or certificate conferrals divided by the number of institutions offering the degree or certificate

Programs, constellations, or disciplines with larger-than-average sizes may be more scalable and therefore more suitable for investment.

Programs with small average sizes may have limited growth opportunities due to high competition or structural considerations.

Associate Degrees: Spotlight Programs Overview

Liberal Arts, Health, Business and Computer and Information Science/Information Technology (CIS/IT) together comprise 71% of degrees conferred nationally and 58% of degrees conferred at CWI in 2018. We selected these programs for detailed analysis due to their prevalence nationally, market share, and projected future growth.

	Proportion of Portfolio					Conferral Growth, 2014 to 2018					Program Size vs. U.S. Average*				
	CWI	MSA	Idaho	Region	U.S.	CWI	MSA	Idaho	Region	U.S.	CWI	MSA	Idaho	Region	U.S.
1 Liberal Arts	30%	26%	50%	56%	39%	-4%	-7%	+8%	+12%	+13%	+947%	+354%	+842%	+1,323%	+609%
2 Health	11%	28%	15%	13%	18%	+117%	-20%	-12%	-8%	-3%	-48%	-34%	-44%	-18%	-11%
3 Business	10%	8%	7%	9%	10%	+8%	-58%	+16%	+13%	0%	-13%	-56%	-53%	-30%	-22%
4 CIS/IT	7%	6%	3%	3%	3%	-1%	-15%	+8%	+19%	+6%	-53%	-66%	-68%	-56%	-55%
All Disciplines	N/A	N/A	N/A	N/A	N/A	+10%	-21%	+3%	+7%	+7%	-35%	-39%	-37%	-8%	N/A

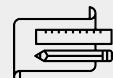
Spotlight: Liberal Arts Associate's Degrees

CWI is the expected **dominant provider of Liberal Arts associate's degrees in the MSA** as the only comprehensive community college in the area. There may still be room for CWI to grow its footprint at the state and regional level by reinforcing its unique role as a transfer student feeder to regional four-year institutions.



Proportion of Portfolio					Conferral Growth, 2014 to 2018					Program Size vs. U.S. Average				
CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.
30%	26%	50%	56%	39%	-4%	-7%	+8%	+12%	+13%	+947%	+354%	+842%	+1,323%	+609%
<ul style="list-style-type: none"> Significant portion of CWI's portfolio CWI underweight compared to state, region, and nation 					<ul style="list-style-type: none"> CWI's small decline in conferrals is unexpected, especially when compared to national trends (+13%) Nationally, the discipline's market growth was nearly double the average for all disciplines. 					<ul style="list-style-type: none"> CWI's programs are significantly larger than the MSA, state, and national average but still a little smaller than the region The average size of liberal arts associate's degree programs at CWI is significantly above the MSA and national averages for the discipline 				

Most Popular Programs



Liberal Arts/
Liberal Studies



General Studies



Humanities

Spotlight: Health Associate's Degree

There is **considerable room for CWI to grow in health associates degrees.** *Two small private for-profit institutions confer the majority of degrees in the MSA. CWI should compete by attracting students with employer-aligned programming and the learning breadth of a community college.



Proportion of Portfolio					Conferral Growth, 2014 to 2018					Program Size vs. U.S. Average				
CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.
11%	28%	15%	13%	18%	+117%	-20%	-12%	-8%	-3%	-48%	-34%	-44%	-18%	-11%
<ul style="list-style-type: none"> CWI significantly underweight at less than half compared to the MSA 					<ul style="list-style-type: none"> CWI's spike in conferrals due to recent expansion in health programming Within nursing, CWI conferred only 29 degrees in 2018 (down 17% from 2014) and captured 33% of market share 					<ul style="list-style-type: none"> CWI programs are smaller than the national average and close to the MSA and state average The national average size of nursing programs, a staple within the discipline, is 79 degrees per year 				

*Stevens-Henager College and Carrington College-Boise

Most Popular Programs



Registered Nursing



Radiologic Technology



Medical Assistant



Dental Hygienist



Physical Therapy
Assistant

Spotlight: Business Associate's Degree

CWI has significantly grown its market share, which is likely the cause of a decrease in conferrals at other MSA institutions. There may still be unmet opportunity to expand. With its strong foothold in the market, **CWI has the opportunity to build targeted and workforce-aligned programs.**



Proportion of Portfolio					Conferral Growth, 2014 to 2018					Program Size vs. U.S. Average				
CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.
10%	8%	7%	9%	10%	+8%	-58%	+16%	+13%	0%	-13%	-56%	-53%	-30%	-22%
<ul style="list-style-type: none"> CWI matches national average at 10% CWI's conferrals rose 8%, less than the state or region, while the MSA contracted sharply CWI's programs are slightly smaller than the national average for all associate's degrees, but larger than the average business program Among business degrees, general business administration is often the tentpole program that attracts the highest demand and supports other concentrations 														

Most Popular Programs



Business Administration



Accounting



Administrative Assistant

Spotlight: CIS/IT Associate's Degree

CWI has room to grow in CIS/IT, the fastest-growing discipline in the U.S. at the bachelor's and master's levels, which we predict will grow even more quickly for associate's. CIS/IT CWI can capitalize on its 77% market share to **grow its capacity now to meet the expected increase in demand in the future.**



Proportion of Portfolio					Conferral Growth, 2014 to 2018					Program Size vs. U.S. Average					
CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.	
7%	6%	3%	3%	3%	-1%	-15%	+8%	+19%	+6%	-53%	-66%	-68%	-56%	-55%	
<ul style="list-style-type: none"> CWI overweight at 2X+ state, regional, and nation 					<ul style="list-style-type: none"> Conferrals declined very slightly at CWI, less than the 15% decline in MSA Neither CWI nor the MSA matched regional or national growth 	<ul style="list-style-type: none"> CWI's program size is similar to the national average for CIS/IT programs, which is 55% smaller than the U.S. average size across all disciplines 									

Most Popular Programs



Computer and
Information Sciences



Information Technology



Networking and
Telecommunications



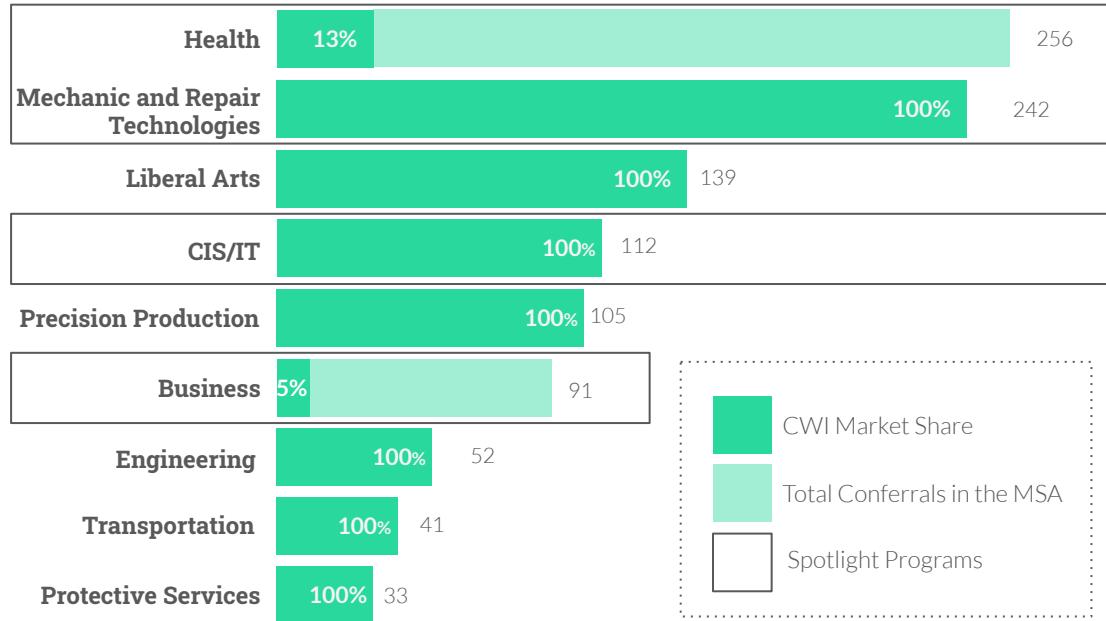
Computer Programming



Computer
Science

By local market share, Health, CIS/IT, and Business are certificate disciplines' with growth potential for CWI.

Selected certificates conferred in the Boise City MSA, 2018, and CWI's market share*



The Entangled team used market share as a starting point to investigate program demand.

Local degree market share and conferrals suggest CWI may have room to grow in:

- Health
- CIS/IT
- Business

CWI may have limited room to grow in certificates such as:

- Mechanic and Repair Technologies

Certificates: Spotlight Programs Overview

CWI conferred 766 certificates across 34 active programs in 2018 (67% of overall certificate conferrals in the MSA). **Health, Business, and Mechanic and Repair Technologies together composed 54% of the national certificate market and 37% of CWI's portfolio in 2018.**

	Proportion of Portfolio					Confferral Growth, 2014 to 2018					Program Size vs. U.S. Average*					
	CWI	MSA	Idaho	Region	U.S.	CWI	MSA	Idaho	Region	U.S.	CWI	MSA	Idaho	Region	U.S.	
1	Health	4%	21%	23%	33%	34%	+3%	+27%	-3%	-18%	-18%	-54%	-23%	-36%	+20%	+31%
2	Business	1%	7%	6%	10%	11%	+150%	+2,175%	+105%	-12%	+22%	-48%	-34%	-70%	-52%	-20%
3	Mechanic and Repair	32%	20%	15%	9%	10%	+34%	+34%	+13%	+9%	+2%	-13%	-56%	-52%	-19%	-6%
4	CIS/IT	15%	9%	6%	9%	5%	+3,633%	+3,633%	+242%	+65%	+22%	-22%	-22%	-40%	-24%	-34%
All Disciplines		100%	100%	100%	100%	100%	+103%	+125%	+59%	+0%	+2%	-6%	-18%	-43%	-17%	N/A

Spotlight: Health Certificate

CWI is missing opportunities to meet demand in health with few certificate options in a market that is eager to access job-aligned, smaller-bite health credentials. CWI is in a position of strength to compete against the local private for-profit providers, especially since Boise State University's offering in this area is negligible (2 conferrals in 2018).



Proportion of Portfolio					Conferral Growth, 2014 to 2018					Program Size vs. U.S. Average				
CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.
4%	21%	23%	33%	34%	+3%	+27%	-3%	-18%	-18%	-54%	-23%	-36%	+20%	+31%
<ul style="list-style-type: none"> CWI significantly underweight compared to MSA, state, region, and nation 					<ul style="list-style-type: none"> Conferrals grew slightly at CWI and significantly in the MSA CWI reported three of the eighteen total health certificates in the MSA in 2018 					<ul style="list-style-type: none"> CWI's program size is significantly below the national average 				

Most Popular Programs



Medical Assistant



Nursing Assistant



Licensed Practical/Vocational Nursing

*Stevens-Henager College and Carrington College-Boise



EMT/Paramedic

Spotlight: Business Certificate

CWI is significantly underweight in business certificates and may have significant room to expand this offering. **The school should capitalize on their local employer partnerships to increase demand.**



Proportion of Portfolio					Conferral Growth, 2014 to 2018					Program Size vs. U.S. Average				
CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.
1%	7%	6%	10%	11%	+150%	+2,175%	+105%	-12%	+22%	-48%	-34%	-70%	-52%	-20%
<ul style="list-style-type: none"> CWI significantly underweight compared to MSA, state, region, and nation 					<ul style="list-style-type: none"> Growth in conferrals is pretty variant across geographies but has increased in Idaho, the MSA, and at CWI 91 total business certificates were conferred in the MSA in 2018 					<ul style="list-style-type: none"> CWI conferred just 5 business certificates in 2018 (1% of its total certificate conferrals), up from 2 in 2014 				

Most Popular Programs



Business
Administration



Accounting



Administrative Assistant/
Secretarial Science

Spotlight: Mechanic and Repair Certificate

CWI is now “the only game in town,” responsible for all Mechanic and Repair certificates in its MSA. There may be little future growth to capture.



Proportion of Portfolio					Conferral Growth, 2014 to 2018					Program Size vs. U.S. Average				
CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.
32%	20%	15%	9%	10%	+34%	+34%	+13%	+9%	+2%	-13%	-56%	-52%	-19%	-6%
<ul style="list-style-type: none"> CWI significantly overweight compared to state, region, and nation 					<ul style="list-style-type: none"> CWI's conferrals grew 34%, matching the MSA, significantly outpacing the state, region, and nation 					<ul style="list-style-type: none"> CWI's programs are smaller than the national average but appear much larger than at the MSA and state-level, which may be a quirk of the small number of conferrals 				

Most Popular Programs



Automotive Technology



Diesel Mechanics



Industrial Mechanics



HVAC and Refrigeration Maintenance

Spotlight: CIS/IT Certificate

The region is not keeping pace with the national average, which may mean there is **space in the region for CWI to be a go-to provider of short-term, accredited tech credentials**. Following national trends, build CIS/IT certifications into the program curricula so students can earn recognized, job-ready professional credentials while completing their coursework.



Proportion of Portfolio					Conferral Growth, 2014 to 2018					Program Size vs. U.S. Average				
CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.	CWI	MSA	ID	Region	U.S.
15%	9%	6%	9%	5%	+3,633%	+3,633%	+242%	+65%	+22%	-22%	-22%	-40%	-24%	-34%
<ul style="list-style-type: none"> CWI significantly overweight compared to MSA, state, region, and nation 					<ul style="list-style-type: none"> Growth for CWI and the MSA has grown exponentially in a very short period of time 					<ul style="list-style-type: none"> CWI, the MSA, and region are similarly sized larger than at the state and nation 				

Most Popular Programs



Computer and Information Sciences



Computer Systems Networking And Telecommunications.



Computer/information Technology Administration And Management.



Computer Programming



Labor Market and Job Demand

Key takeaways about job demand for CWI:



There's room to grow CWI's portfolio by exploring unmet labor market demand in Health, Business, and CIS/IT. These professions are all at moderate or below risk of automation with significant projected growth in the MSA, state, and region. Examine CWI's current capacity to design or deliver these programs at speed.



CWI may attract students in new geographies by expanding Health, Business, and CIS/IT. Similarities between wage, growth, and other indicators of labor market demand across the MSA, state, and region, may give the institution greater leverage to attract new students with high-quality programming.



Consider automation, even in high-demand professions, when designing programs. There can be significant variation in automation among professions. For instance, accounting is more susceptible to automation than other areas of Business. While it may still be valuable to invest in an accounting program, do so in a flexible certificate way that can more quickly respond to changes in the job market.

Four key metrics guide the labor market demand analysis.

Projected Job Growth	Average Worker Wage	Annual Job Postings per Worker	Risk of Automation
<p>The expected change in the number of positions in a given occupation</p> <p>High projected growth rates signal increasing demand from employers, which tends to prompt increased educational demand.</p>	<p>The estimated average wages for all occupations by MSA and state, according to the Bureau of Labor Statistics (BLS)</p> <p>A high average wage often correlates with higher demand for postsecondary education in that field, because students are more likely to choose programs that lead to higher-earning occupations.</p>	<p>The number of annual job postings relative to the number of workers employed in an occupation</p> <p>A high ratio of postings to workers in an occupation is a strong indicator of employer demand and signals future employment growth.</p>	<p>How likely automation is to replace jobs in future employment, according to categorization by Burning Glass</p> <p>Entangled Solutions calculates weighted average automation risks for groups of occupations and presents these risks on a scale from very low to very high.</p>

Labor Market Overview: Spotlight Disciplines

The Labor Market analysis spotlights three disciplines based on high growth potential and employer demand. **Health, Business, and Computer Information Systems/Information Technology (CIS/IT)** all are existing CWI programs with positive indications of growth and employer demand and low-to-moderate risk of job automation, making them good candidates for future growth.

	Projected Annual Job Growth		Average Worker Wage		Annual Job Postings per Worker		Risk of Job Automation	
	MSA	U.S.	MSA	U.S.	MSA	U.S.		
1	Health	+1.8%	+1.9%	\$47K	\$50K	0.29	0.34	Very Low-Low
2	Business	+0.5%	+0.2%	\$46K	\$50K	0.29	0.34	Moderate
3	CIS/IT*	+1.1%	+0.4%	\$67K	\$68K	0.38	0.88	Very Low
All Disciplines		+1.0%	+0.8%	\$47K	\$51K	0.29	0.31	Low-Moderate

Spotlight: Health Labor Market Landscape

Overview

Health professions demand is robust across all four geographies. The very low risk of automation and high projected annual job growth makes it an especially good profession to invest in with degrees and certificates.



	Projected Annual Job Growth	Average Worker Wage	Annual Job Postings Per Worker
MSA	+1.8%	\$47K	0.29
Idaho	+2.3%	\$44K	0.31
Region	+2.3%	\$53K	0.37
U.S.	+1.9%	\$50K	0.34

Risk of Job Automation

Very low to low

Key Occupations

- Registered nurses
- Personal care aides
- Nursing assistants
- Home health aides
- Licensed practical nurses

Spotlight: Business Labor Market Landscape

Overview

Business employment demand is strong and projected to grow significantly at the state and regional levels. The comparable wage across geographies make it a steady profession for adding programs. Be mindful of the moderate automation risk, higher in occupations like accounting.



	Projected Annual Job Growth	Average Worker Wage	Annual Job Postings Per Worker
MSA	+0.5%	\$46K	0.31
Idaho	+0.9%	\$42K	0.26
Region	+1.4%	\$50K	0.31
U.S.	+0.2%	\$50K	0.29

Risk of Job Automation

Moderate



Key Occupations

- Office clerks
- Customer service representatives
- Secretaries and administrative assistants
- Bookkeepers and accounting clerks

Spotlight: Computer Information Systems/ Information Technology Labor Market Landscape

Overview

CIS/IT profession demand is strong across all geographies and especially projected to grow at the MSA, state, and regional level. The very low risk of automation and markedly high annual job postings make it a promising profession to increase program investment.



	Projected Annual Job Growth	Average Worker Wage	Annual Job Postings Per Worker
MSA	+1.1%	\$67K	0.38
Idaho	+0.9%	\$55K	0.69
Region	+2.6%	\$68K	0.72
U.S.	+0.4%	\$68K	0.88

Risk of Job Automation

Very Low



Key Occupations

- Computer user support specialists
- Network and computer systems administrators
- Computer network support specialists



Program Recommendations

Program Recommendations: Overview

Based on the results of both the Program and Labor Market demand analyses together, **CWI should prioritize new or expanded associate degrees and certificates in the following disciplines in addition to Liberal Arts:**

Business

Engineering

Computer and Information Sciences

Education

Health

Protective Services

- This section ranks the most highly-recommended associate's degree and certificate programs
- These recommendations:
 - Equally weigh program and labor market demand
 - Rank in descending order from top to bottom by top opportunities for CWI
- The analysis considers 83M workers across 260 occupation categories, aligning to CWI's current and potential offerings. This represents:
 - 58% of the total American workforce
 - 58% of the MSA workforce (185K people)
- **Liberal Arts is a critical component of CWI's portfolio,** though it does not align with specific occupations and therefore is not ranked here.
- **Expanding** recommended disciplines, **especially Business, Health, and CIS/IT**, would attract more students and bolster CWI's status as a first-choice transfer institution

Associate Degree Opportunity Rank Detail

Degree Constellation	Degree Market				Labor Market Rank			
	MSA	Idaho	Region	U.S.	MSA	Idaho	Region	U.S.
Nursing	2	1	1	1	2	2	2	2
Allied Health and Medical Assisting	1	3	6	9	4	7	8	7
Allied Health Diagnostic, Intervention, and Treatment	9	7	4	5	1	3	3	3
Teacher Education	4	15	12	13	8	11	9	9
Dental Support Services	3	4	9	11	13	14	13	10
Health Administration	5	11	16	8	10	8	7	8
Criminal Justice and Corrections	7	14	17	12	12	5	4	4
Computer and Information Sciences	16	8	2	4	3	1	1	1
Electrical Engineering	10	12	14	16	7	6	6	5
Business Administration	11	9	3	2	5	4	5	6

- Health, as five of the ten top associate degree constellations*, is highly recommended for CWI to expand
- CIS/IT and Business are strongly recommended from both a program demand and labor market perspective
- CWI may want to consider investing in the other constellations (e.g., Teacher Education), but note that these are currently smaller programs with markedly lower rankings outside the MSA
- There is some variability across geographies in these constellation rankings

Note: Constellations are groups of programs that share similar curricula or audiences. This section ranks the most highly-recommended associate's degree and certificate programs out of 336 constellations, of which 90+ were relevant to CWI

Certificate Opportunity Rank Detail

Degree Constellation	Degree Market				Labor Market Rank			
	MSA	Idaho	Region	U.S.	MSA	Idaho	Region	U.S.
Business Administration	1	1	9	3	7	7	8	7
Allied Health Diagnostic, Intervention, and Treatment	11	8	20	14	1	2	3	4
Practical/Vocational Nursing	2	3	3	2	21	12	20	19
Somatic Bodywork	8	4	12	20	6	5	7	11
Allied Health/Medical Assisting	3	11	8	10	10	11	12	12
Electrical Engineering Technologies	7	14	24	15	8	6	9	3
Dental Support Services	4	6	17	22	19	26	24	18
Computer Programming	17 (tie)	10	11	12	2	15	5	8
Drafting/Design Technologies	6	7	16	23	18	19	17	14
Air Transportation	17 (tie)	23	6	28	3	3	4	5

- Business Admin is the most recommended certificate for CWI to expand, weighing both degree and labor demand
- Health is highly recommended with seven of the top 10 certificates. This indicates that hands-on Health programs are a worthwhile investment, despite COVID-19 complications
- CWI may want to consider investing in the other constellations (e.g., Electrical Engineering), but note that these are currently smaller programs with markedly lower rankings outside the MSA
- There is significant geographic variation

CWI can capitalize on both program and labor market demand by beefing up Health, Business, and CIS/IT programming



Key Takeaways in Program Demand

- There's room to grow CWI's portfolio by exploring unmet program demand in Health, Business, and CIS/IT.
- CWI can shine by differentiating itself as a transfer institution.
- Significant demand growth for certificates indicates that shorter bursts of learning are desirable to students, but not equally across programs.



Key Takeaways in Labor Demand

- There's room to grow CWI's portfolio by exploring unmet labor market demand in Health, Business, and CIS/IT.
- CWI may attract students in new geographies by expanding Health, Business, and CIS/IT.
- Consider automation, even in high-demand professions, when designing programs.

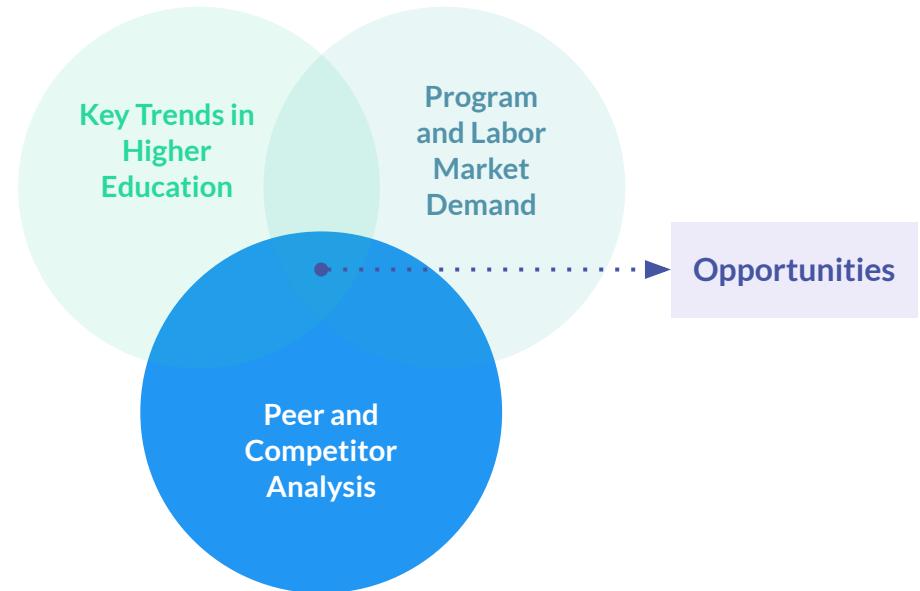


Key Takeaways in Program Recommendations

- CWI can meet strong program and labor market demand by adding Health, Business, and CIS/IT associate degrees and certificates
- Significant demand for Health programs justifies investment though COVID-19 will complicate hands-on experiential offerings



Peer and Competitor Analysis

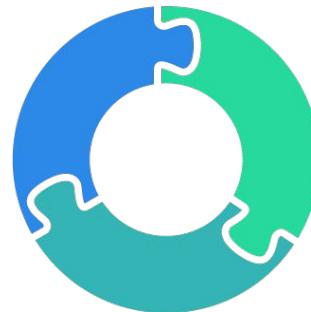


Our analysis of the peer and competitor landscape explores three components to provide CWI with a comprehensive view of approaches, initiatives, and differentiators.

This peer and competitor analysis allows CWI to benchmark itself against near and aspirational peers and to explore approaches from the field to address challenges unique to the community college space.

Exemplar Offerings

Example community college programs or initiatives that align with the four areas for CWI's development identified during sensemaking



Idaho Competitors

Community colleges in the state (North Idaho College, the College of Eastern Idaho, and the College of Southern Idaho) that are alternative options for prospective CWI students

Peers

Institutions from across the country who are current and aspirational peers to CWI, against which the institution can benchmark itself



Idaho Competitors Analysis

Key takeaways for CWI from the Idaho competitors analysis:



Compared to its peers, CWI is unparalleled in terms of its student population size and growth trajectory. CWI has approximately 7,000 students more than its closest Idaho peer, a margin that is expected to increase at its current rate of growth. As an institution serving the largest counties in the state, the institution can translate its large pool of prospective students into a significant education center of gravity in the state.



CWI has an opportunity to step forward in the Idaho distance education space. CWI is on par with the national average of students enrolled in at least one online course, but, in a post-COVID-19 environment, the demand for online education is expected to increase significantly.

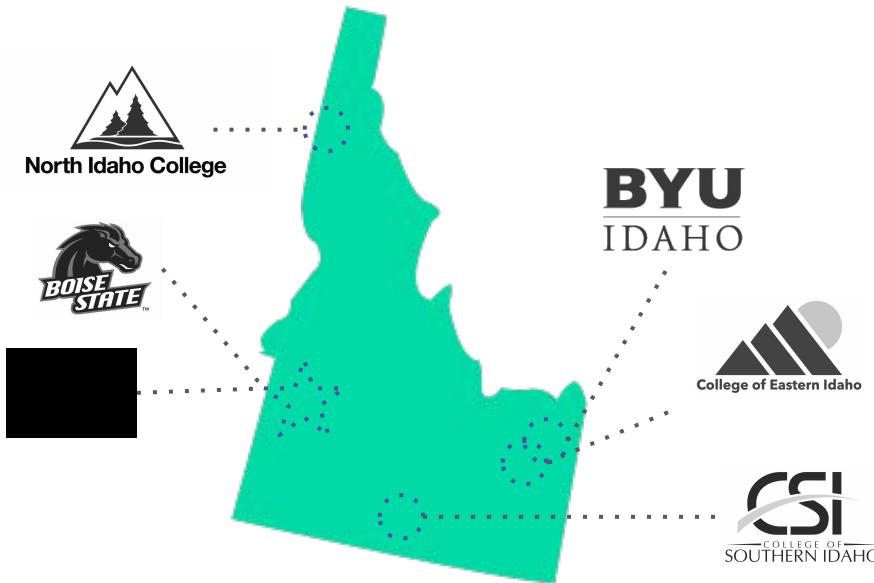


Industry partnerships are a critical component of success for all community colleges. Leveraging its position as the top community college in Idaho, CWI has an opportunity to strengthen the depth and breadth of its employer relationships to provide high-impact opportunities for its students.



The competitive analysis underscores CWI's programmatic gaps. As identified in the job/program demand analysis, CWI is underweight in its health, technology, and business program offerings.

CWI is the largest and fastest-growing community college in Idaho, signaling a competitive edge amongst in-state peers.



Four community colleges options are available to Idahoans, and understanding CWI in the context of the state higher education market enables the college to best position itself to be the go-to choice for learners.

Following the advent of COVID-19, **the number of learners seeking ongoing education in the state is likely to increase**, making CWI a critical provider in the Idaho higher education landscape.

Idaho Competitor Comparison

College	Total Students (credit)	Cost Per Credit Hour	% Students Enrolled in at Least 1 Distance Education Course	% Enrollment Growth Between 2015-2019	Key Employer Partnerships	Competitive Advantages / Differentiators
College of Western Idaho	20,576	\$139	36%	44%	Micron Technology Western States Cat Saint Alphonsus Health System	<ul style="list-style-type: none"> • High placement for CTE programs • Most affordable community college in Idaho
North Idaho College	5,078	\$141	58%	-8%	Amazon American Job Center	<ul style="list-style-type: none"> • Partnership with NIC and U of I for AS, BS, MS, and PhDs in Computer Science
College of Southern Idaho	12,679	\$140	33%	5%	Kenworth Co. J.R. Simplot Co.	<ul style="list-style-type: none"> • Hispanic-Serving Institution (HSI) eligible • First ID community college approved to offer a bachelor's degree
College of Eastern Idaho	2,038	\$129	3%	9%	Microsoft Cisco CompTIA	<ul style="list-style-type: none"> • Partnerships with 3 industry leading tech certification providers
Boise State University	22,064*	\$252	36%	19%	Micron Technology CapEd Credit Union	<ul style="list-style-type: none"> • One of <i>U.S. News and World Report's</i> top 50 innovative schools • Tier 2 research institution
BYU-Idaho	20,592	\$175	77%	17%		<ul style="list-style-type: none"> • Robust offering of online degrees • Expansion into dual enrollment space

*Represents Boise State's total undergraduate enrollment. In 2019, Boise State awarded 132 associate degrees.

CWI is the only Idaho community college without a major focus on the health or computer science disciplines among associate's degrees.

College	Top Five Associate's Programs by Number of Conferrals*				
College of Western Idaho	Liberal Arts and Sciences/Liberal Studies	Business/Commerce, General	Criminal Justice/Safety Studies	Biology/Biological Sciences, General	Psychology, General
North Idaho College	General Studies	Registered Nursing/ Registered Nurse	Business Administration and Management, General	Social Work	Computer Programming, Specific Applications
College of Southern Idaho	Liberal Arts and Sciences/Liberal Studies	Registered Nursing/ Registered Nurse	Business Administration and Management, General	Health Professions and Related Clinical Sciences	Teacher Education, Multiple Levels,
College of Eastern Idaho	Registered Nursing	Liberal Arts and Sciences/Liberal Studies	Computer Systems Networking and Telecommunications	Medical/Clinical Assistant	Surgical Technology/ Technologist
Boise State University	Liberal Arts and Sciences/Liberal Studies	Criminal Justice/Law Enforcement Administration	Social Sciences, General		
BYU-Idaho	General Studies	Administrative Assistant and Secretarial Science	Public/Applied History	Business Administration and Management	Physical Therapy Technician/Assistant

CWI has a competitive advantage in mechanic and repair technologies, as well as precision production certificates, fields with medium to high risk for automation

College	Top Five Certificate Programs by Number of Conferrals*				
College of Western Idaho	General Studies	Automobile/Automotive Mechanics Technology/Technician	Machine Tool Technology/Machinist	Welding Technology/Welder	Autobody/Collision and Repair Technology/Technician
North Idaho College	General Studies	Graphic Design	Licensed Practical/Vocational Nurse Training	Speech Communication and Rhetoric	Criminal Justice/Police Science
College of Southern Idaho	Nursing Assistant/Aide and Patient Care Assistant/Aide	Licensed Practical/Vocational Nurse Training	Surgical Technology/Technologist	Liberal Arts and Sciences/Liberal Studies	Geographic Information Science and Cartography
College of Eastern Idaho	Licensed Practical/Vocational Nurse Training	Dental Assisting/Assistant	Radiation Protection/Health Physics Technician	Computer Systems Networking and Telecommunications	Energy Management and Systems Technology/Technician
Boise State University	Organizational Leadership	Business/Commerce, General	Spanish Language and Literature	Communication, Journalism, and Related Programs, Other	Public Relations/Image Management

According to the National Center for Education Statistics, BYU-Idaho did not confer any certificates

*Programs in color text indicate overlap between CWI's Top 5 certificates and its Idaho peers.

Source: National Center for Education Statistics

Idaho Competitor Spotlight: BYU-Idaho

Brigham Young University-Idaho (BYU-Idaho) has grown significantly in recent years, primarily through the development of affordable and accessible online offerings via the BYU-Pathway Worldwide program. Located in Rexburg, BYU-Idaho serves almost 50,000 students per year, 15,000 of whom study entirely online. Though the institution has not to date been seen as a particular competitor to CWI, BYU-Idaho is competitively positioned within the state in two key areas of note for CWI.

1. Online Learning

BYU-Idaho is situated to dominate in the online space in the state through its robust digital learning capabilities.

BYU-Idaho offers access to BYU-Pathway Worldwide; enrolling nearly 45,000 students, BYU-Pathway Worldwide offers 40+ online certificates and degrees at an extremely low cost (\$75-160 per credit).

The stackable credentials model allows students to earn 3 job ready certificates, 1 associate's degree, and 1 bachelor's degree for the same cost and time that it would have taken to only get a bachelor's degree.

2. Dual Enrollment

Though CWI serves many students in the Treasure Valley through dual enrollment and dual credit, BYU-Idaho is able to provide similar offerings through an online format.

In 2019, BYU-Idaho launched their dual enrollment program. Rather than students taking a limited selection of courses at their high school, BYU-Idaho allows students to enroll in any course the university offers on campus or online.

Students are taught by BYU-Idaho professors in courses with college students, giving them a real taste of the BYU-Idaho college experience while earning job-ready credentials.



Peer Analysis

Key takeaways for CWI from the peer analysis:



Institutions are prioritizing student success. Using the guided pathways framework highlighted in the current and emerging trends section, these peers are implementing institution-wide student support reforms to increase timely degree completion and transfer-out rates.



Pairing student success initiatives with tailored technology solutions is a critical part of improving student outcomes. The right mix of technology solutions allows institutions to more effectively provide students with timely information and resources, and it provides rich data to inform institutional planning



The academic portfolios of peers vary substantially in terms of breadth and depth. It appears as though peers with limited competition from local community colleges tend to offer more programs across a wide selection of academic disciplines, whereas more intense competition leads to more specialization. However, institutional resources, regional needs, and a host of other factors also influence an institutions program mix.



Establishing a presence as a regional pillar is achieved through holistic community development. In addition to robust employer partnerships, community engagement is fostered through active participation in programs and efforts that serve not just current and prospective students, but learners and community members beyond campus.

Learnings from four peer institutions provide CWI with relevant success stories from the field.

Boise State University



As CWI's most significant peer in the state, Boise State is a critical institution to profile in greater depth. Though not a two-year institution, Boise State was the primary institution serving the Treasure Valley before CWI was opened and has a powerful presence in the region.

Competitive Peer



Bakersfield College



CWI's rapid growth over the past decade has differentiated the institution, not just in the state of Idaho. Bakersfield College in California has experienced a similar amount of growth, providing CWI with the opportunity to explore what similar institutions are doing.

Growth Peer



Salt Lake Community College



Salt Lake Community College in Utah is, like CWI, located outside of a major metropolitan center and serving a similar population of students. As such, it can demonstrate how parallel institutions serve their communities.

Parallel Peer



Valencia College



Valencia College in Florida is lauded as an innovative, expanding institution that has done incredible good for its students and community. As such, CWI would benefit from investigating how it accomplished that success and what CWI can take away from that to inform the next 10 years.

Aspirational Peer



Competitive Peer: Boise State University



Overview

Year founded 1932

Size 22K students

Location Boise, ID

Student:faculty ratio 17:1

Cost \$252 per credit hour

Programs offered 89 bachelor's degrees
4 Associate's degrees
47 Certificates

Modalities Offered In-person
Online
Competency-based

Unique Value Proposition

Boise State University(BSU) is the largest public institution in Idaho, offering residents an affordable in-state education with national brand recognition.

With the tech industry driving rapid economic growth in the Boise metropolitan area, BSU has evolved into a hub for innovation, research, and entrepreneurship locally and throughout the state

Standout Feature

Founded in 2015, the College of Innovation and Design (CID) identifies new pathways of learning for students across public higher education that yield skills to meet emerging workplace needs.

Faculty, staff, and students develop solutions to address various challenges, including access in higher education, the environment, and the future of work. The CID also houses a student entrepreneurship incubator program and a statewide entrepreneurship challenge.

Student Support Initiatives

Finish in Four is a program designed to encourage graduation in four years by granting early registration to students that meet with their academic advisors each semester and remain in good standing.

First-year students are financially incentivized to enroll in an online, one-credit university preparation course.

Enrollment Peer: Bakersfield College



Overview

Year founded 1913

Size 33K students

Location Bakersfield, CA

Student:faculty ratio 31:1

Cost \$46 per credit hour

Programs offered 1 Bachelor's degree
78 Associates degrees
75 Certificates

Modalities offered In-person
Online
Hybrid

Unique Value Proposition

Bakersfield College (BC) has experienced rapid enrollment growth in recent years as the institution has become more deeply embedded in the diverse community it serves.

BC is an official Hispanic Serving Institution and in 2015, founded the Social Justice Institute with community leaders to explore issues of equity that affect BC students and the diverse local communities.

Standout Feature

In 2019, BC launched the Program Pathway Mapper (PPM), an homegrown online tool that guides students in program exploration and academic planning. For any academic program of interest, students are provided with interactive, visually appealing semester-by-semester course plans and real-time labor data on salary and job growth for associated occupations.

The Kern Transfer Promise supports students completing their associate's degree in two years, upon which they are guaranteed admission at a California State University system school.

Student Support Initiatives

To get more students to complete and/or transfer on time and without excess units, BC has intentionally designed an innovative formal structure through which cross-functional teams of faculty and staff are responsible for advancing student success with defined targets, such as attempting 15+ units by the end of the first semester or enrollment in college-level math and English in the first year.

Parallel Peer: Salt Lake Community College



Overview

Year founded 1948

Size 30K students

Location Salt Lake City, UT

Student:faculty ratio 22:1

Cost \$114 per credit hour

Programs offered 116 Associate's degrees
81 Certificates

Modalities Offered In-person
Online
Hybrid

Unique Value Proposition

Serving a geographic dispersed student population, Salt Lake Community College (SLCC) has achieved success by providing flexible, quality programs at the most affordable price point in the state.

SLCC offers in-person courses in 10 locations during the week and on weekends, in addition to a robust offering of hybrid and online courses that are supported by 24/7 tech support and free online tutoring.

Standout Feature

The Miller Business Resource Center is a partnership between SLCC, the Goldman Sachs Foundation, Small Business Administration, and other state and federal partnerships. Through this center, local business owners have access to business advisors, classes and trainings, funding resources, and a co-working space.

For students interested in entrepreneurship, the Miller Business Resource Center offers a 10-week Everyday Entrepreneur Pathway Program that guides students in validating an idea through the launch of their business

Student Support Initiatives

SLCC is in the midst of the multi-year Pathways Strategic Initiative, a student-centered plan that provides students with a guided program of study designed to enhance learning and clarify a student's route to program completion

SLCC has transfer partnerships with all four-year institutions in the state of Utah.

Aspirational Peer: Valencia College



Overview

Year founded 1967

Size 47K students

Location Orlando, FL

Student:faculty ratio 25:1

Cost \$103 per credit hour

Programs offered 7 bachelor's degrees
65 associate's degrees
60 certificates

Modalities offered In-person
Online
Hybrid

Unique Value Proposition

Valencia College has become a top community college in the country through a commitment to innovation that improves the learner experience

To facilitate this innovation, the college introduced a new collaborative work and governance model that includes a Learning Leadership Council charged with identifying new initiatives

Student Support Initiatives

LifeMap is a student's guide to figuring out "what to do when" in order to complete their career and education goals. LifeMap links all of the components of Valencia (faculty, staff, courses, technology, programs, services) into a personal itinerary to help students succeed in their college experience.

Standout Feature

In August 2018, The Walt Disney Co. launched Disney Aspire, a new education benefit program administered through Guild Education that covers 100% of tuition costs for employees working toward their degrees at partner institutions. Disney's decision to work with Guild was largely contingent upon Valencia becoming Guild's first community college academic partner.

Through the Aspire program, Disney employees pursuing their education at Valencia receive coaching support from Guild and on-site study hall spaces on the Disney campus.

Analyzing the program portfolio and online offerings of peers reveal multiple paths to success in conferrals.

Valencia, the leading peer in conferrals, offers a depth of programs in limited academic disciplines while SLCC, the second leading peer, offers a breadth of programs across a wide range of academic disciplines. Comparatively, CWI offers strong online education offerings, however, online education represents a development area for each of these institutions.

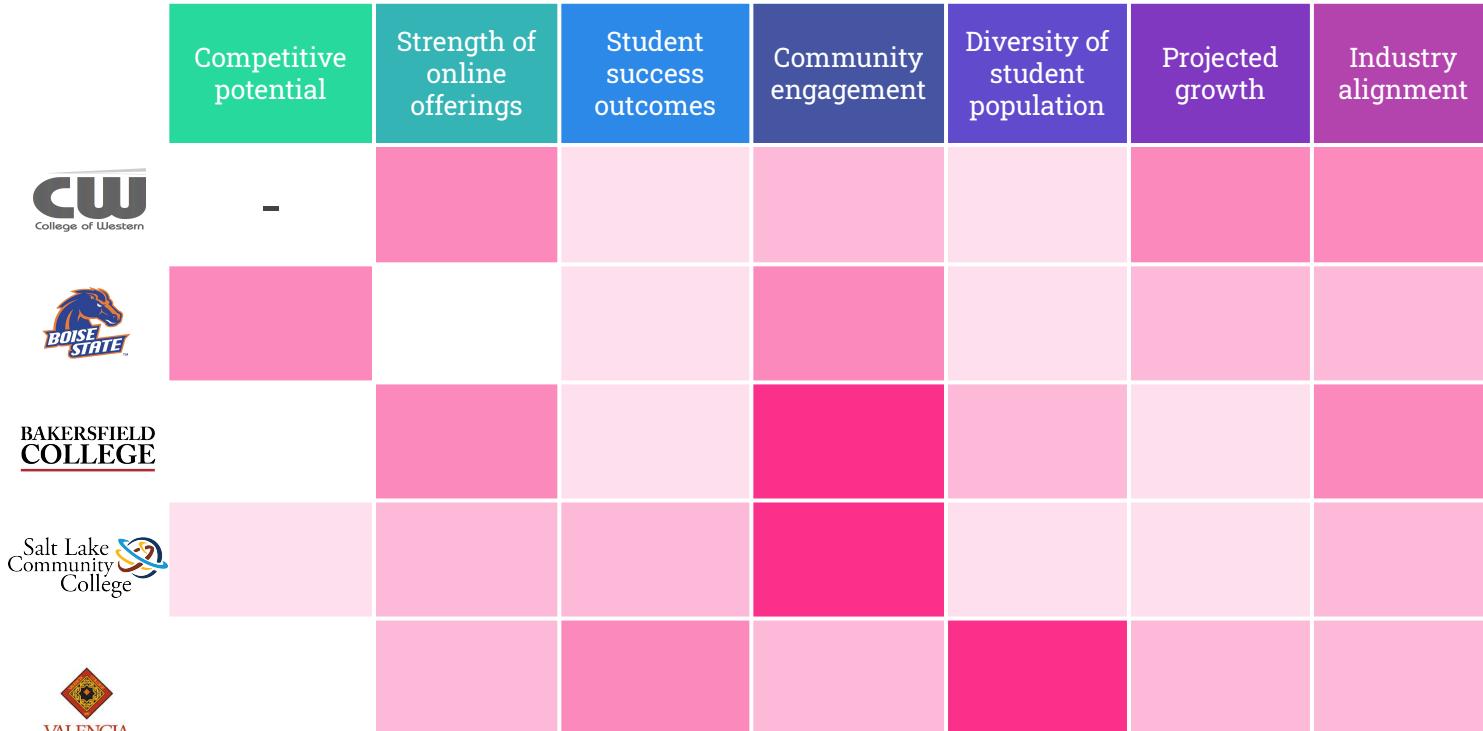


An analysis of branding provides a more nuanced view of how schools position themselves in the market.

These colleges signal their affordability, workforce alignment, and innovation to prospective students. CWI's emphasis on the quality of experience, in terms of instruction and student-centeredness, is unique but likely key with a large research institution like BSU as a competitor.

	Value / Affordability	Employment and Workforce Emphasis	Flexibility	Research Emphasis	Intimacy of Learning Experience	Innovation	Student-Centrism
 College of Western Washington		✓			✓	✓	✓
 Boise State University			✓	✓		✓	
<u>BAKERSFIELD COLLEGE</u>	✓	✓				✓	
 Salt Lake Community College	✓	✓	✓				
 Valencia Community College	✓	✓			✓	✓	✓

Overall Peer Comparison



Stronger match

Weaker match



Exemplar Offerings

Key takeaways for CWI from the exemplar offering analysis:



Solutions require sustained investment and commitment, often over years. These programs and initiatives take time, whether they are completed in stages or intentionally structured to be started within a department and scaled across the institution.



Leadership buy-in is critical. These initiatives are not grassroots or bottom-up; they are enabled by senior-level leadership engagement and endorsement. Resources and allocated focus is what allows the work to be a priority and to be set up for success.



Individuals from across the organization are engaged in initiatives to maximize the expertise on the team. All four of these initiatives have impacts that span the institution, from senior leadership down to the student, so the engagement of the folks who will be both involved in implementing as well as the folks who are most impacted by change are at the table from the beginning.



Not everyone may be on board. Change is difficult, and complete unity behind a new strategic initiative or direction is likely not possible. This is a reality that these different institutions accepted in service to the objectives they aligned on for the institution.

CWI can draw insight from other institutions excelling in the areas in which the college is hoping to grow.

Other institutions have launched programs and initiatives in the areas of development for the college identified by community members. These exemplar offerings can provide models for CWI as it considers solutions and opportunities for the institution.



**Commitment to a Clear
North Star**



**Refined Institutional
Approach to Change**



**Improved Information
Sharing**



**Strengthened Status as a
Regional Pillar**

Paul Quinn College

Monroe Community College

Tulsa Community College

Nicolet College

Exemplar offering profile: Paul Quinn College



Overview

Location: Dallas, TX

Year Founded: 1872

Institution Type: Private, faith-based, four-year, liberal arts-inspired college

Enrollment: 550

Development Area Addressed



Commitment to a Clear North Star

Exemplar Offering: The New Urban College Model

The clarity of Paul Quinn president Michael Sorrell's vision, and the alignment of the college to it, serves as a model for schools looking for an approach to refine and work towards a singular north star.

In Fall 2015, Paul Quinn College initiated the "New Urban College Model" to enable learners to balance a liberal arts experience with workforce-aligned skills development. To open opportunity for Paul Quinn students, both on campus and within the Dallas community, all students are required to have a job while they study. The college is the first work college in Texas and the only Minority-Serving Institution with the "work college" designation. To make balancing employment with school possible, and to alleviate additional financial barriers to success, tuition was cut by 40%, all course materials are publicly accessible for free, and students are provided access to free professional clothes if they need them. **President Sorrell made challenging and, at times, controversial decisions in the name of creating an urban work college, such as converting the school's football field into a community farm, but the coordination of the school around a guiding direction transformed the school's future.**

President Sorrell's commitment to making an education at Paul Quinn affordable not only saved the institution from losing its accreditation and closing, but made it a model institution with a new remote campus opened in 2018.

Takeaway for CWI

Refining an institutional identity, designing for the unique needs of a community and student population, and aligning the entire school around those factors defined one of the most notable school turnaround stories of the last decade. CWI can take its progress so far towards developing a vision for the school, design a future with and for its community, and use that as a basis for transformational realignment of individuals across the institution.

Exemplar offering profile: Monroe Community College



Overview

Location: Rochester, NY

Year Founded: 1961

Institution Type: Public community college

Enrollment: 11,878

Development Area Addressed



Refined Institutional Approach to Change

Exemplar Offering: The “100 Days to Innovate at MCC” Initiative

To best position itself to innovate, Monroe Community College (MCC) implemented coordinated processes and structures to maximize ideas for institutional improvement and change.

After observing team members at MCC have ideas without translating those insights into action, President Anne Kress had the institution assemble a framework called “100 Days to Innovate at MCC: One Bite at a Time.” This initiative was designed to support the institution in harnessing learnings and opportunities from across the school and systematically reviewing and enacting them as appropriate.

The framework included evaluation and selection criteria to ensure that the projects chosen align with strategic plans, student success efforts, financial constraints, impact, and a realistic timeline.

The framework laid out steps to plan, pilot, and scale projects with clarity around ownership, support, and metrics for success.

Takeaway for CWI

Innovation depends on processes and procedures across an institution to enable ideas for change to be not only collected and assessed, but also translated into measurable action. As CWI reviews the existing structures that it uses to evaluate opportunities, it can look to institutions like MCC that have designed such processes.

Exemplar offering profile: Tulsa Community College



Overview

Location: Tulsa, OK

Year Founded: 1970

Institution Type: Public community college

Enrollment: 14,413

Exemplar Offering: A Knowledge-Sharing Framework

Tulsa Community College (TCC) is a multi-campus system that needed greater coordination across the institution and decreased siloing across academic units. The transparency and efficiency of organizational knowledge was compromised as a result. In order to address challenges it faced in keeping the various campuses and units on the same page, TCC sought to develop processes and an approach to align the college.

TCC leaned on its library to create a knowledge-sharing framework and culture. It created a position to oversee the transformation, starting with the libraries and expanding learnings to scale knowledge-sharing across the college. This role, along with a team, **developed ways to capture, create a repository for, and transfer knowledge that has resulted in tools and processes ready to scale across the school.**

Development Area Addressed



Improved Information Sharing

Takeaway for CWI

Knowledge management is a challenge that no one entity has managed to do particularly well, especially in the higher education space. However, there is learning to be had from first piloting an effort within a specific unit at CWI before scaling a solution across the institution.

Exemplar offering profile: Nicolet College



Overview

Location: Rhinelander, WI

Year Founded: 1967

Institution Type: Public technical college

Enrollment: 912

Exemplar Offering: Guiding Rural Innovation and Development (GRID)

Nicolet College is the only college in the Northwoods region of Wisconsin, making them not only a unique provider of education in the region but also a center of gravity for community. In order to bring the school and community together and to find ways to better connect current students with opportunities for economic mobility in the region, Nicolet launched an entrepreneurship center on campus.

Nicolet's GRID (Guiding Rural Innovation and Development) connects emerging and growing businesses with information, resources, and a professional network to **create a culture of innovation at the school, foster entrepreneurship in the region, and ensure that the rural economy is vibrant and diverse.**

Development Area Addressed



Strengthened Status as a Regional Pillar

Takeaway for CWI

There are ways that CWI can strategically engage the community that will not only improve its profile in the Treasure Valley, but also benefit the institution considerably. Identifying initiatives that strengthen the link between current CWI students and folks from across the region bond the school and the surrounding community.

Other institutions' efforts present CWI insights for developing its own solutions.

Area of Development



Commitment to a Clear North Star



Refined Institutional Approach to Change



Improved Information Sharing



Strengthened Status as a Regional Pillar

Community College

Paul Quinn College

Monroe Community College

Tulsa Community College

Nicolet College

Action That Addresses Areas of Development

Refining an institutional identity, designing for the unique needs of a community and student population, and aligning the entire school around those factors

Processes and procedures across an institution to enable ideas for change to be not only collected and assessed, but also translated into measurable action

Piloting a knowledge management effort within a specific unit before scaling a solution across the institution

Identifying initiatives that strengthen the link between students and individuals from across the region to bond the school and the surrounding community



Summary of Insights for CWI

Analyzing peers and competitors affirms CWI's potential for continued success in the next decade.



CWI can have confidence in its competitive edge and strong position amongst peers. As it plans for its next ten years, it can take additional learnings from the field to sustain this position and get ahead of opportunities that will catalyze its differentiation in the market, in Idaho and beyond.



Key Takeaways from Idaho Competitors

- Compared to its peers, CWI is unparalleled in terms of its student population size and growth trajectory.
- CWI has an opportunity to step forward in the Idaho distance education space.
- Industry partnerships are a critical component of success for all community colleges.
- The competitive analysis underscores CWI's programmatic gaps.



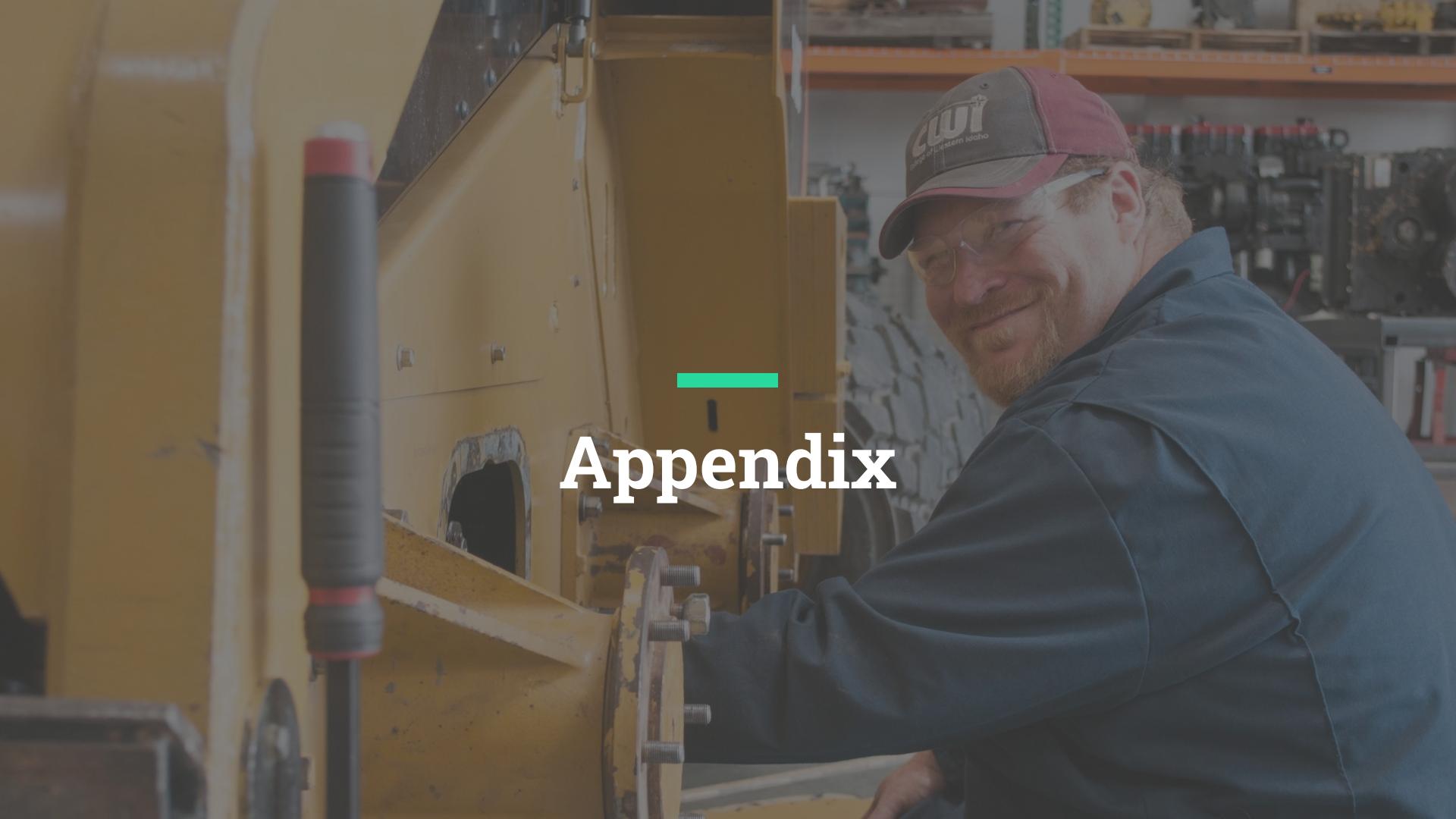
Key Takeaways from Peers

- Institutions are prioritizing student success.
- Pairing student success initiatives with tailored technology solutions is a critical part of improving student outcomes.
- These peers are not trying to be everything to everybody.
- Establishing a presence as a regional pillar is achieved through holistic community development.



Key Takeaways from Exemplar Offerings

- Solutions require sustained investment and commitment, often over years.
- Leadership buy-in is critical.
- Individuals from across the organization are engaged in initiatives to maximize the expertise on the team.
- Not everyone may be on board with change.



Appendix

To identify opportunities that maximize this moment, Entangled conducted a multi-faceted survey of both higher education and workforce landscapes.

Primary Research

- Interviewed leading experts in the field of community colleges
- Leveraged primary research conducted through previous Entangled engagements



Secondary Research

- Reviewed trends in the higher education space and beyond, profiling key institutions
- Analyzed quantitative data from the National Center for Education Statistics (NCES), the Bureau of Labor Statistics (BLS), and Burning Glass Technologies



Internal Analysis

- Synthesized findings from primary and secondary research to identify key themes and insights
- Pressure tested insights with thought leaders across the Entangled and Guild spheres



Opportunities

Combined learnings using the full breadth of information gathered and analysis conducted to identify most compelling growth opportunities for CWI



Key Trends in Higher Education

Colleges are more actively seeking public-private partnerships.



Drivers

Impact

Institutions are seeking PPPs to fill in services and opportunities via partnerships so they can focus on their core offerings and drive revenue while alleviating financial and political pressures. These partnerships provide greater flexibility and efficiency regarding utilization of infrastructure and developing new programs to both meet student demands and create new revenue streams.



Public-private
partnerships (PPPs)

Examples

CREDENTIAL DEVELOPMENT

Santa Monica College and Amazon Web Services have collaborated to create a cloud computing certificate that has proven wildly popular for providing employer-recognized instruction in in-demand, employer-aligned skills.

MARKETING AND BRANDING

Concordia University in Minnesota partnered with Learning House to outsource branding, marketing, recruitment, and retention for the university's adult undergraduate programs and many master's programs, both on the ground and online. They also provide some strategic consulting services.

CAMPUS SPACE

University of Maryland at College Park partnered with the Southern Management Corporation, which fronted \$180M to build a hotel, restaurants, a spa, a fitness center, meeting space, and office space. UMCP then partnered with Capital One to build a tech incubator and with WeWork to create co-working space on campus.

Public-private partnerships are increasingly common in higher education.



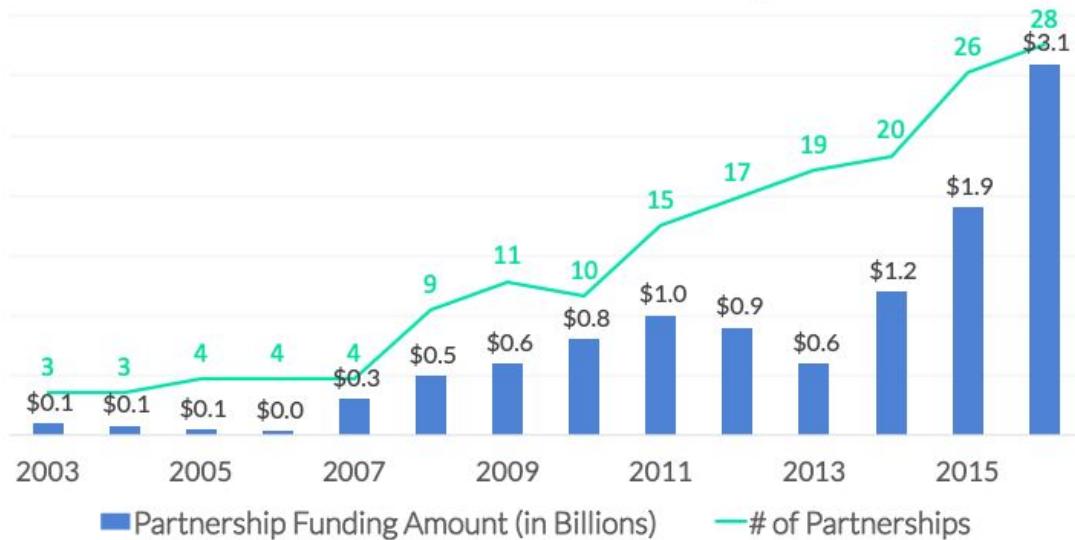
Drivers

Impact

There is immense and growing opportunity through PPPs to access additional resources.



The Rise of Public-private Partnerships in Higher Education



Shared service models are a practical way for institutions to play to their strengths.



Drivers

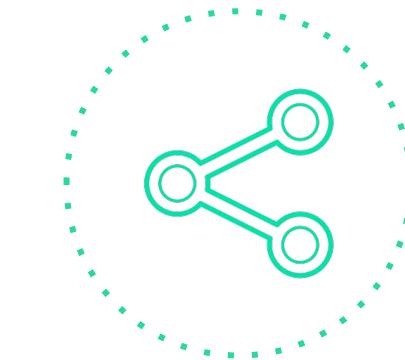
Impact

Like PPPs, shared services models allow for institutions to focus on their academic core by paying outside organizations for necessary back-end services, including basic business functions and back-office technology.



The Innovation Alliance in Ohio is a shared services model launched by the University of Akron (UA) and Lorain County Community College (LCCC).

The University of Akron (UA) and Lorain County Community College (LCCC) share back-office technologies--non-competing, non-unique business functions that were previously duplicated. This collaboration can serve as a model for other institutions.



Shared services models

Strategic partnership models are mutually beneficial for learning providers.



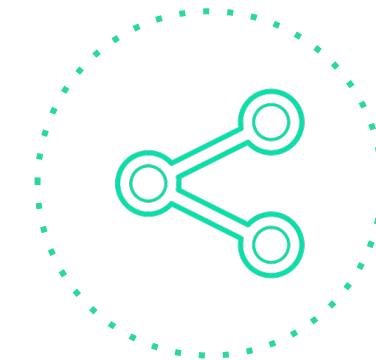
Drivers

Impact

Collaborating with peer institutions through sharing services or other resource maximization approaches does not create competition, but instead allows all partner institutions to thrive.



“ We've started to see real traction with community college players that proactively sought out partnerships with other, complementary providers in the space. ”
- Anne Kauth, formerly of Foundry College



Shared services models

High school student enrollment has shifted in relation to the other macro level changes.



Driver

Impact

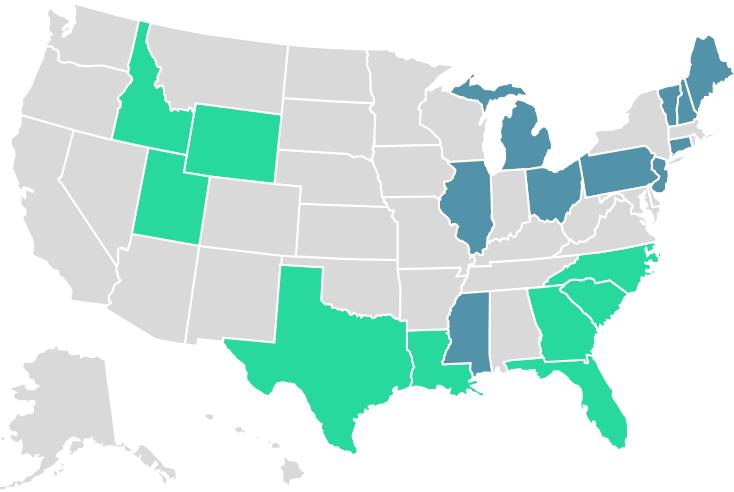
Increasing HS enrollment trends show that there's a growing pipeline of prospective traditionally college-aged students who could potentially choose CWI

Largest percentage with declining enrollment:

- Connecticut
- New Hampshire
- Maine
- Michigan
- Vermont
- Pennsylvania
- Mississippi
- Ohio
- New Jersey
- Illinois

Largest percentage with boosts in enrollment:

- Utah
- Texas
- Georgia
- Colorado
- Louisiana
- Idaho
- North Carolina
- Oklahoma
- Washington, D.C.
- South Carolina



- These shifts in enrollment numbers are stemming from numerous causes—often aligning with emerging employment opportunities.
- Idaho is projected to see an 11% growth in high school enrollment from 2016-2028

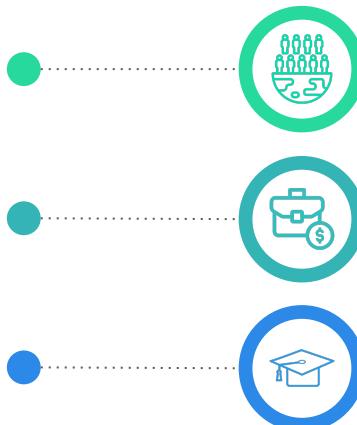
The increasing population and job opportunity in Idaho widen the pool of prospective students in the state.



Driver

Impact

Whether they are high school graduates selecting a post-secondary learning path or individuals needing upskilling or additional credentials to secure positions in the state's workforce, prospective student populations increase as individuals from across the country explore their opportunities in Idaho.



Population Growth

With a 2.09% growth rate in 2018, Idaho has one of the fastest-growing populations in the U.S.

Job Growth

In 2019, jobs in Idaho grew by 2.5% in Idaho, the fourth highest rate in the country.

Projected Growth in College Population

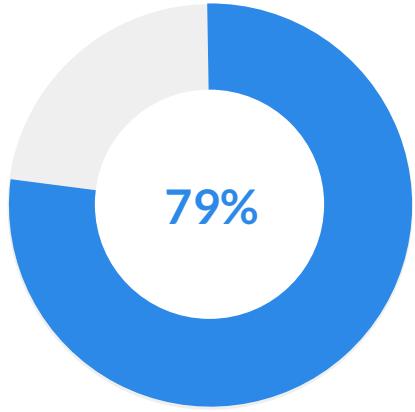
Idaho is projected to see significant growth in high school student populations over the next 10 years

Most Idahoans have broadband access, but certain populations remain disconnected.



Drivers

Impact



Idahoans with access to broadband 100mbps or faster

- There are 307,000 people in Idaho without access to a wired connection capable of 25mbps download speeds.
- Another 107,000 people in Idaho don't have any wired internet providers available where they live.
- 83% of Idahoan tribal populations lack broadband access
- In May of 2019, Governor Brad Little signed an executive order establishing a broadband task force to develop a plan to improve broadband speed for the state.

Early indicators show the Guided Pathways model has promise for improving student success.



Drivers

Impact

Both Jackson College and Wallace State Community College offer **Guided Pathways** that include a clear sequences of courses, a coherent curriculum, and connection to careers and transfer opportunities through collaboration of student services, admissions, IT, and marketing.

Community College	Intervention Highlights	Success
Jackson College	<ul style="list-style-type: none">First-Year Seminar: Required 2-credit course for all new students, Navigating College and Life.Placement: Math placement test retake available after completing a new one-credit, three-week pre-algebra review course.	<ul style="list-style-type: none">The share of students with at least six college-level credits in first-term increased from 35% in 2015 to 71% in 2019.Fall-to-fall annual retention increased 12% from 2017 to 2019.
Wallace State Community College	<ul style="list-style-type: none">Success Coaches: Success coaches contact every first-year student weekly to guide their educational planning and connection to resources.Course Redesign: Modified developmental and gateway courses to incorporate modularized, contextualized, and accelerated curriculum	<ul style="list-style-type: none">The share of students who completed a degree or certificate in 3 years increased from 23% in 2013 to 38% in 2017.Students utilizing a success coach on a regular basis had a retention rate 10% higher than students who did not.

As learning models evolve, institutions face obstacles adopting new courseware.



Driver

Impact

Defined as instructional content scoped and sequenced to support delivery of an entire course through purpose-built software, courseware enhances instructors' ability to customize learning environments around the individual needs of students

- Many institutions have **limited capacity for the lengthy process** of compiling options, comparing outcomes, and assessing institutional fit
- **Concern over tech functionality**, especially Learning Management System (LMS) integration, leads instructors to pick products they are sure can integrate easily
- Faculty face **steep learning curves with new technology features**; moreover, they also need to know how to effectively incorporate the tool into their class design



“ There are students that are unprepared and uncertain about how they are doing in their education. While many faculty are overwhelmed and struggle to respond to every student's individual needs, they can use tools like courseware to help students understand their own progress whenever they would like. ”

- Karen Vignare, Executive Director of Personalized Learning Consortium with the Association of Public and Land-Grant Universities

Key Definitions



Drivers

Impact

Non-degree credentials: These include two types of work credentials—certifications and licenses (or work credentials), and postsecondary educational certificates.

Bootcamps: Intensive programs usually lasting less than one year that aim to teach a discrete skill or skillset, with clear pathways to jobs

Federally funded job-training programs: Employment and training programs funded under the Workforce Innovation and Opportunity Act, operated and managed by local and state workforce boards

Opportunity on-ramps: Short-term programs serving unemployed and underemployed adults, teaching a blend of technical and nontechnical skills and leading to industry-recognized certifications (e.g., Per Scholas)

Apprenticeship programs: Programs lasting between six months and two years that connect participants directly to a career pathway by enabling them to work directly with potential employers

Career Technical Education: These programs offer both academic and technical training at high schools, postsecondary institutions, or a combination of both.

College MVPs: Short programs providing a blend of technical, cognitive and noncognitive skills that guarantee a college degree, and often using income-share agreements to help students afford them (e.g., Holberton School)

Postsecondary degree programs: Traditional two- or four-year programs at universities or colleges

Market forces are driving increased interest in competency-based education.



Driver

Impact

In competency-based education (CBE), students advance through curricula only when they demonstrate mastery of a competency. This is in contrast to traditional instruction that uses seat time (e.g. semesters) to verify learning. A growing number of institutions are interested in adopting CBE offerings; 86% of institutions are interested in or are currently adopting CBE and 75% expect CBE programs to increase in the next 5 years. Enthusiasm around CBE is likely because of its unique advantages, though there are some factors inhibiting widespread adoption:

Advantages of CBE

- Improves access for post-traditional students
 - Offers greater flexibility in student schedules
 - Utilizes personalized learning to advance student study and demonstration of mastery
- Measures the quality of learning
- Proven to improve completion rates and workplace readiness
- Highly-valuable in measuring progress in online learning

Challenges for CBE Growth

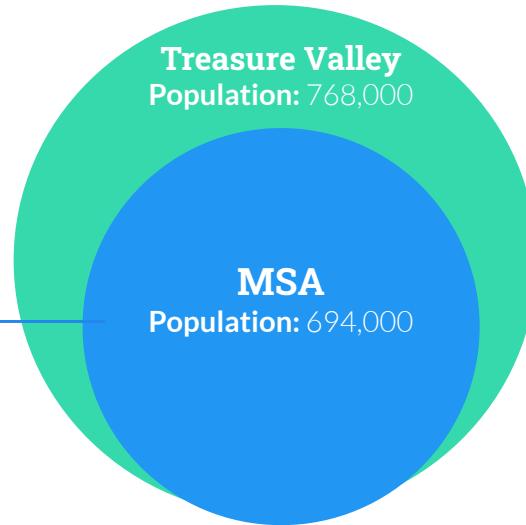
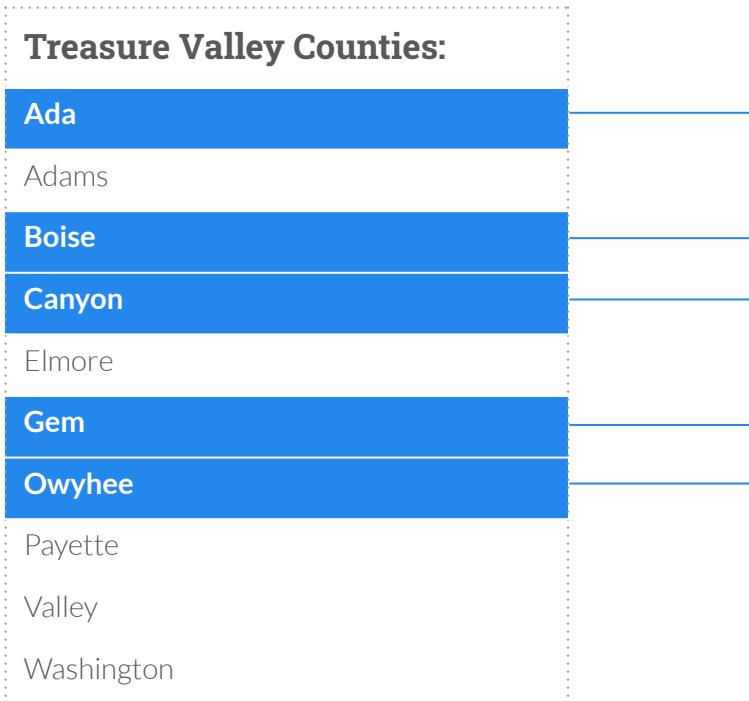
- Program start-up costs are high, as they require organizational, instructional, and regulatory changes
 - Regional accrediting body approval process
 - Alignment with Federal Student Aid regulations
 - Shifts in institutions' business systems and process
- On-campus expertise for developing CBE programs is limited
- Faculty members' may have mixed perceptions of CBE which can stymie adoption



Program and Job Demand

The MSA is used as a proxy for the Treasure Valley.

Metropolitan Statistical Areas are used by the Bureau of Labor Statistics to evaluate metropolitan areas. We used the Boise MSA to have a common geographical area for this analysis.



The MSA accounts for 90% of the Treasure Valley's total population