



INSTITUTIONAL TRANSFORMATION

 | Institutional
Transformation

CONVERSATION ROADMAP

Competitive Landscape

Student Segments & Opportunities

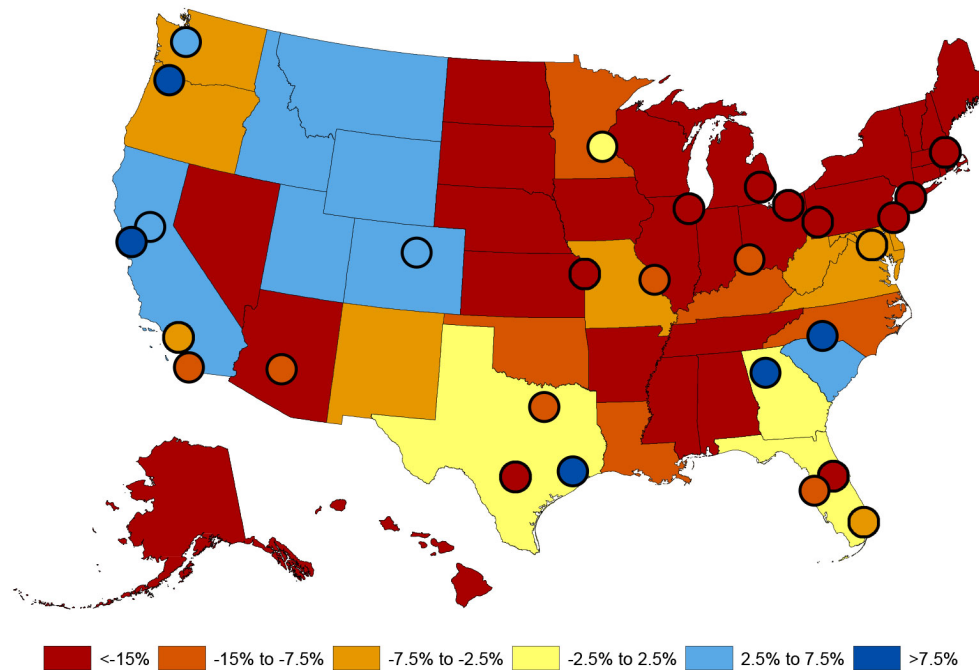
Academic Programs & Labor Market

STUDENT SEGMENTS & DEMOGRAPHICS

What is happening to the
potential student market?

FORECASTED GROWTH & DECLINE OF COLLEGE-GOING STUDENTS

Forecasted growth and decline in college-going students, 2012-2029

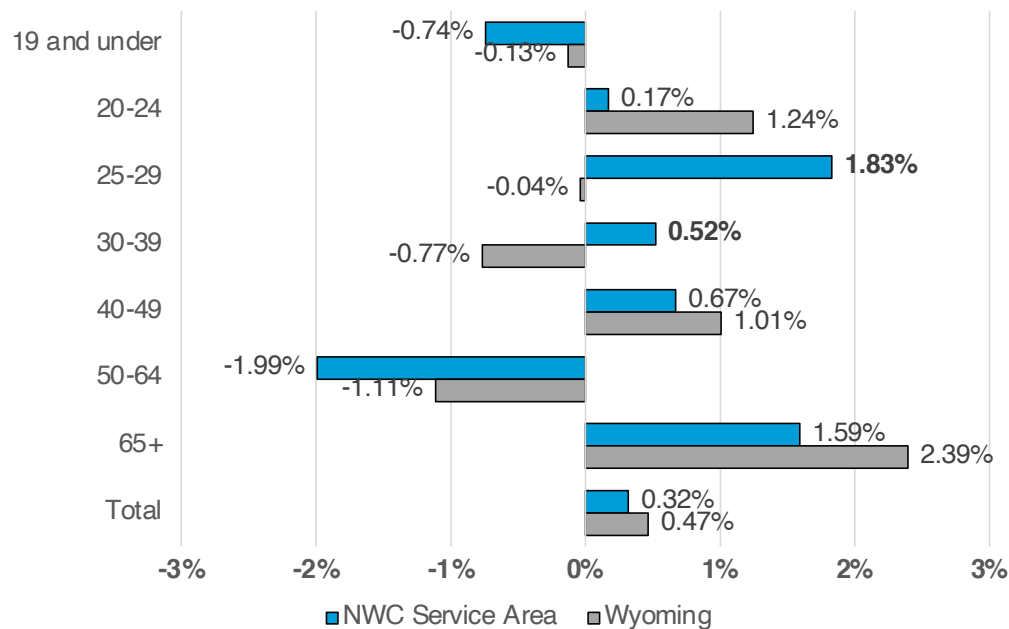


Source: Nathan D Grawe, Carleton College.pdf

Source(s): Nathan Grawe, Demand for Higher Education Index.

PROJECTED POPULATION CHANGES IN REGION & STATE

NWC Service Area
Projected Population Growth
(‘20-’30 CAGR)



Adult learner needs are based on their career stage and specific motivations



Degree Completers



Career Searchers



Lifelong Learners



Career Advancers

COMPETITIVE OVERVIEW

Who is Northwest College's
Competition?

COMPETITIVE FORCES



WORKFORCE &
LABOR MARKET



CORPORATE &
ON-THE-JOB
TRAINING



MOOCs &
WORKFORCE
ACCELERATORS



ONLINE
HIGHER
EDUCATION



2 YEAR & 4 YEAR
COLLEGES &
UNIVERSITIES



NEW COMPETITIVE LANDSCAPE

TRADITIONAL COMPETITIVE LANDSCAPE + EMERGING TECHNOLOGIES/PARTNERSHIPS



From the
Student
Perspective

Learning & Skill Development

Bootcamps & Immersion

Short-term, intense training sessions



Micro-Credentials

Proof of competency in targeted area



DESIGNLAB



Digital Apprenticeships

Focus on mentoring & experience



MOOCs

Open online courses & credential paths



Vocational

Job-specific skills development



Workplace Training

Upskilling platforms & corporate training



Verifying Skills & Experience

Digital Badges

Verify skill development



Blockchain Credentials

Secure digital credentialing



COMPETITIVE LINES ARE BLURRING



Disruption in Traditional Higher Ed Space

- Since 2011, student enrollment has **declined by 12% nationally**
- Between 2017 and 2018, 2-year institutions increased enrollment by **4.1% exclusively enrolled in online** courses
- 2-year institutions lost 6% student enrollment for those not enrolled in any distance education courses in the same period
- **Closures and mergers have doubled in the last decade** compared to before the recession and **shared services have increased**



Corporate Training & Development

- **Nearly 40% growth** of corporate and learning market in the United States
- Corporations & small businesses seek colleges and MOOCs as content providers in training programs



Explosive Growth of MOOCs and OPMs

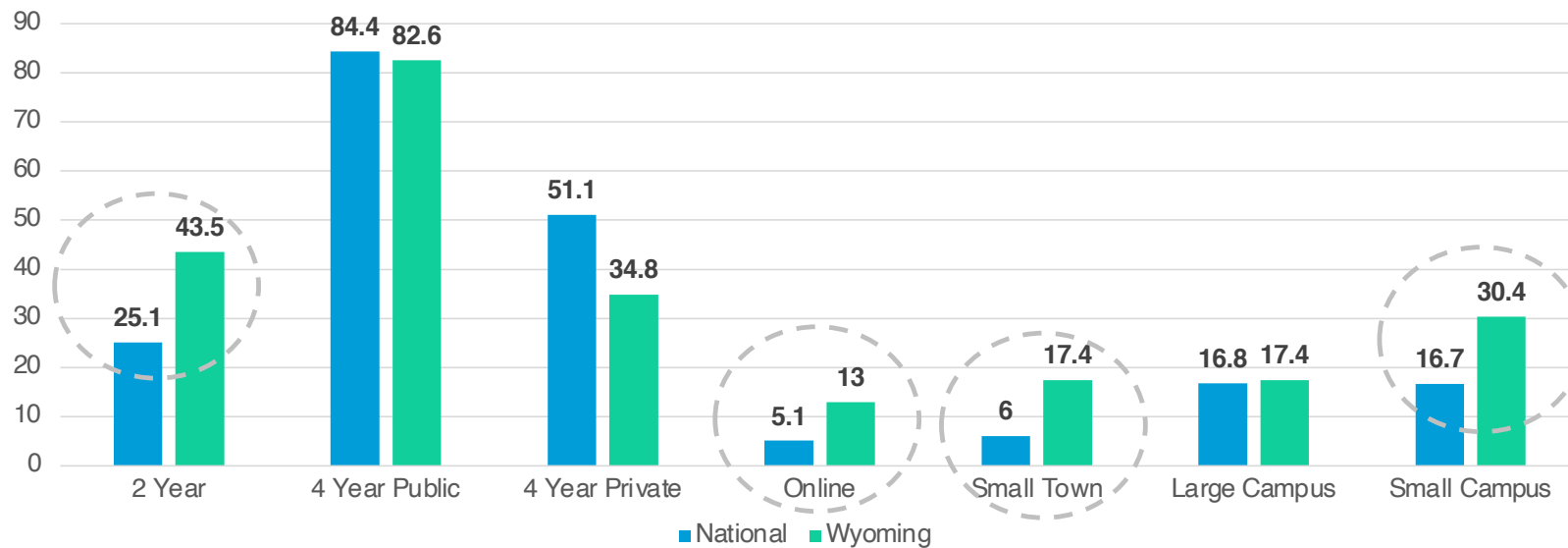
- MOOCs are white-labeling their courses for universities with COVID
- MOOC providers increased micro-credentials from **100 in 2015 to 820 in 2019**

COMPETITION IN WYOMING

Who is Northwest College's
Competition?

WYOMING PROSPECTIVE STUDENTS MORE LIKELY TO CONSIDER COMMUNITY COLLEGE, ONLINE, & SMALL ENVIRONMENTS

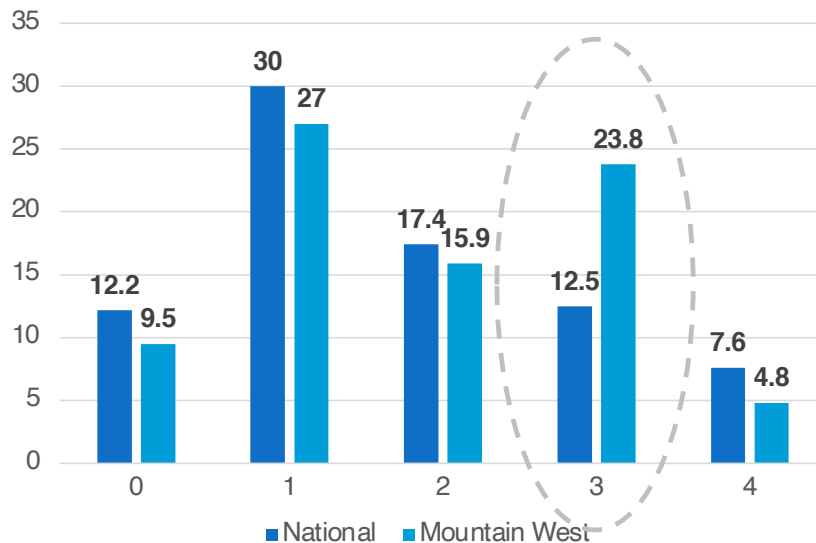
Comparison of Prospective College Student Preferences
Wyoming vs. National, 2020



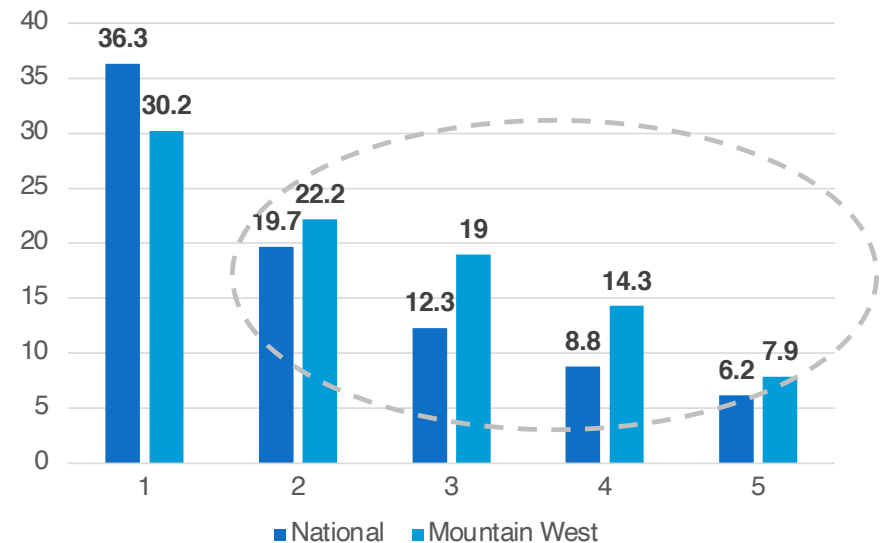
Source(s): NICHE 2020 Senior Survey College Search to Enrollment (n=18,739), Sept. 2020.

COMMUNITY COLLEGE STUDENTS IN MOUNTAIN WEST WERE MORE LIKELY TO CONSIDER MULTIPLE INSTITUTIONS DURING INQUIRY & APP STAGES

Inquiries Submitted by 2-Year College Enrollees from Rural Public High Schools in the Mountain West Region, 2020



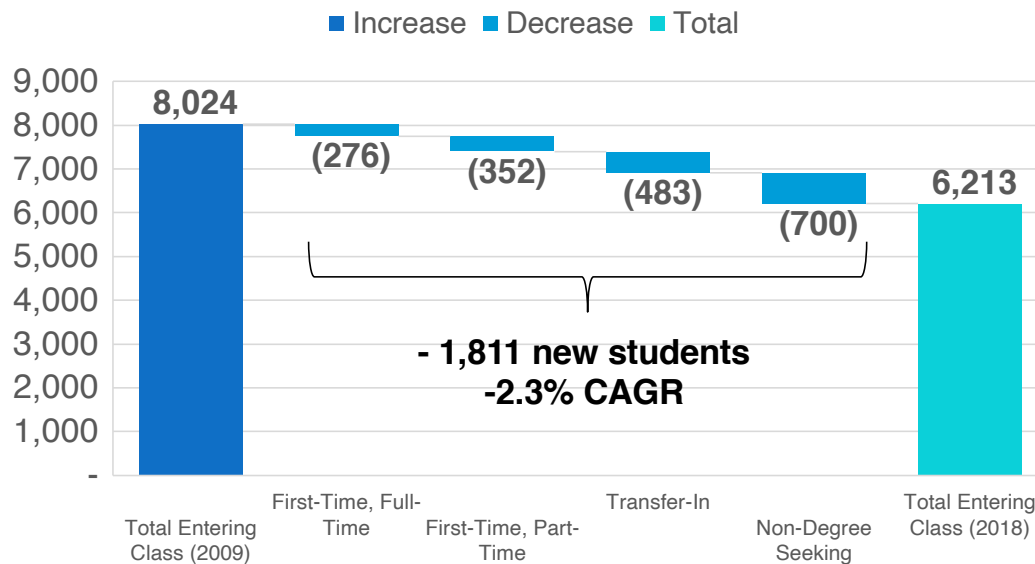
Applications Submitted by 2-Year College Enrollees from Rural Public High Schools in the Mountain West Region, 2020



Source(s): NICHE 2020 Senior Survey College Search to Enrollment (n=18,739), Sept. 2020.

ENROLLMENT DECLINES EXPERIENCED ACROSS SECTORS

Wyoming Community Colleges
Ten Year Headcount Enrollment Net Losses
Fall 2009 - Fall 2018



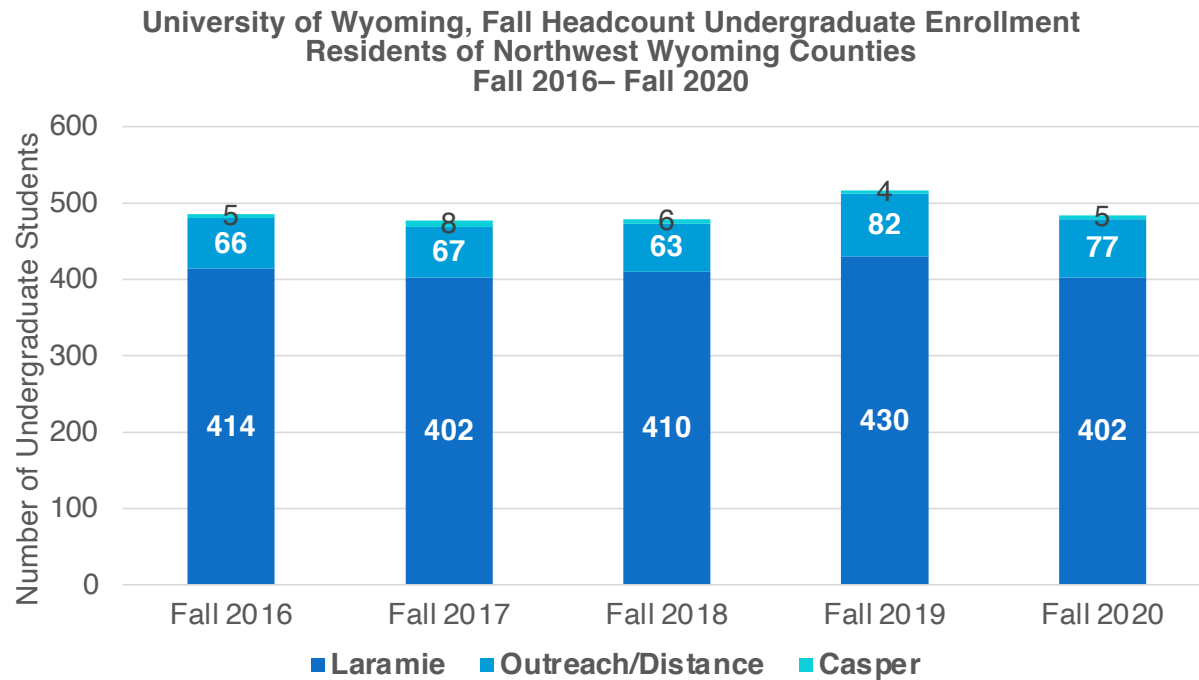
Wyoming New Student Change

Wyoming Community Colleges	-2.30%
University of Wyoming, Undergraduate Residents	-0.70%
Out-of-State First-Time Freshman	-1.60%
Out-of-State Online Enrollments	+1.09%

- University of Wyoming increased its new student pool overall, but lost Wyoming residents overall.
- First-time freshman who attended an institution outside of Wyoming declined.

Source(s): National Center for Education Statistics, IPEDS; University of Wyoming Office of Institutional Research, Headcount Enrollment by County of Origin; NC-SARA Out-of-State Online Enrollment, Fall 2016 to Fall 2019 (Does not include California and Florida and Massachusetts were excluded from the analysis to ensure consistent measurement of growth rate as these two states joined the NC-SARA Compact later than the remainder of the country.)

UNIVERSITY OF WYOMING ENROLLMENT IN REGION LARGELY FLAT, EXCEPT ONLINE & DISTANCE



Pre-COVID Annual Rate Change ('16-'19)

Overall
+1.56%

Laramie Location
+0.95%

Outreach/Distance
+5.58%

Casper Location
+0.00%

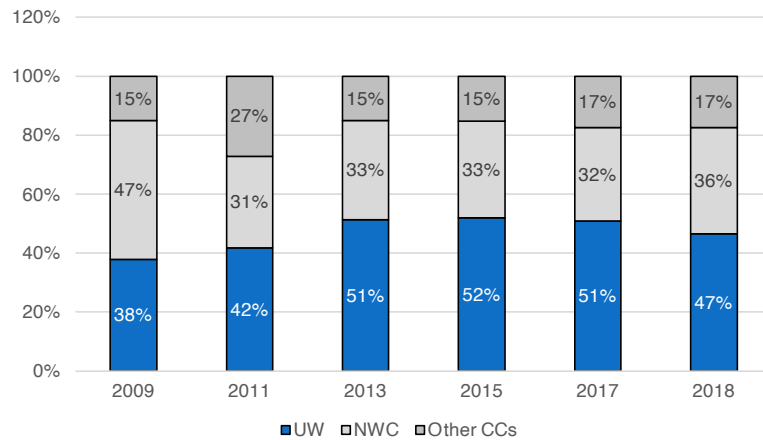
- Overall undergraduate enrollment declined from 5,848 Wyoming residents enrolled in Fall 2016 to 5,647 residents in Fall 2020.

Source(s): University of Wyoming, Office of Institutional Research, Headcount Fall Enrollment by County of Origin, Fall 2016 to Fall 2020.

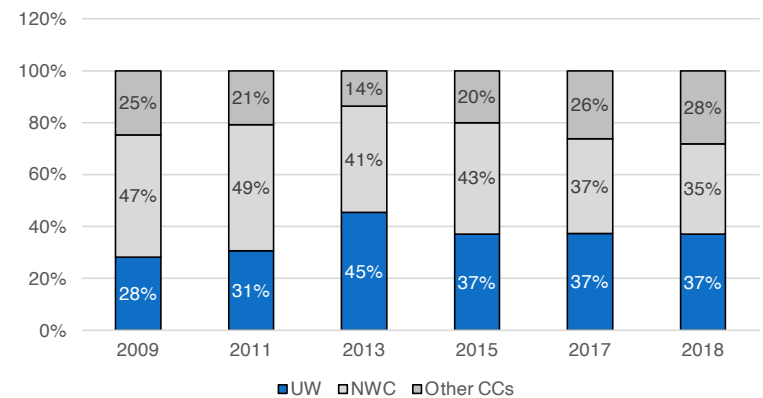
UNIVERSITY OF WYOMING INCREASED SHARE OF HS STUDENTS



Hathaway Performance Scholarship Recipients by Destination Institution (Northwest Wyoming High School Graduates)

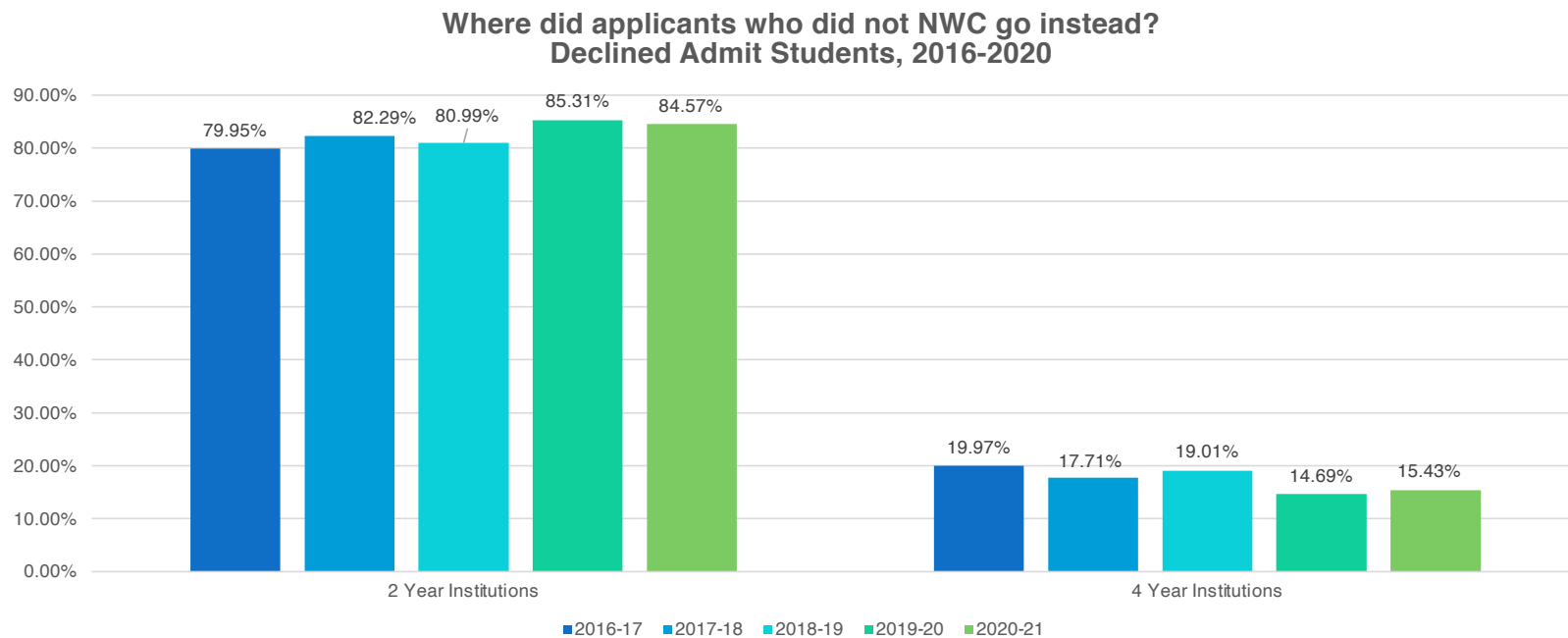


Hathaway Opportunity Scholarship Recipients by Destination Institution (Northwest Wyoming High School Graduates)



Source(s): Wyoming Community College Commission, Hathaway Scholarship Program Data

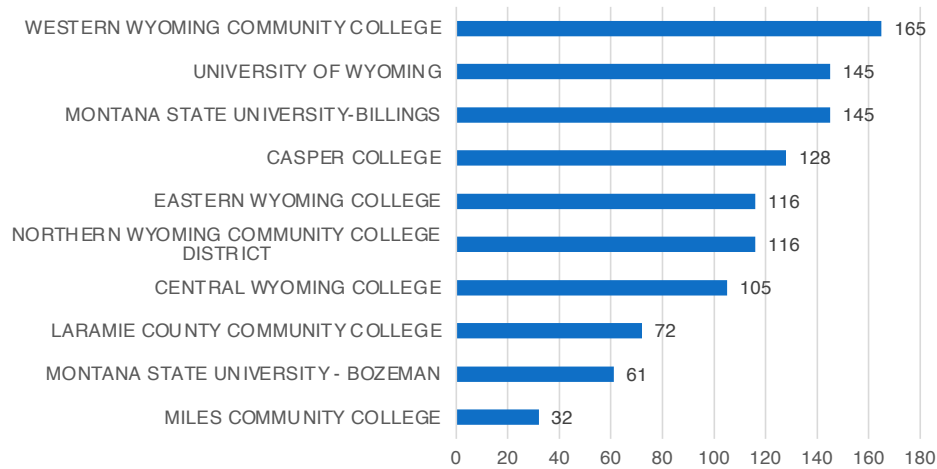
STUDENTS LARGELY CHOOSING 2-YEAR INSTITUTIONS TO ATTEND



Source(s): National Student Clearinghouse Data, NWC Applicants, Declined Admissions, 2016-2020; CampusWorks Analysis, 2021

WHAT INSTITUTIONS OTHER STUDENTS ARE ATTENDING

What were some of the top institutions that NWC applicants decided to attend instead?
2016-2020

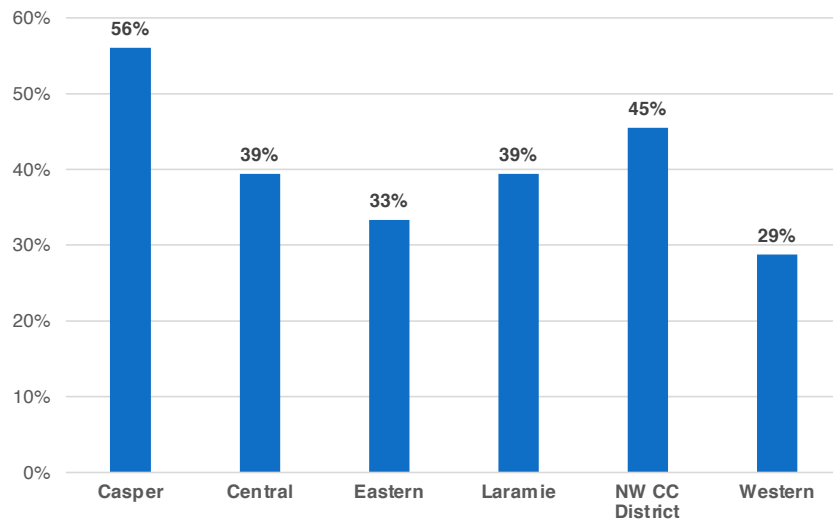


Institution	Percentage Point Gain/Loss
WESTERN WYOMING COMMUNITY COLLEGE	7.07%
MONTANA STATE UNIVERSITY-BILLINGS	4.06%
UNIVERSITY OF WYOMING	-6.11%
CASPER COLLEGE	-3.07%
NORTHERN WYOMING COMMUNITY COLLEGE DISTRICT	5.60%
EASTERN WYOMING COLLEGE	-0.71%
CENTRAL WYOMING COLLEGE	3.40%
LARAMIE COUNTY COMMUNITY COLLEGE	-0.02%
MONTANA STATE UNIVERSITY - BOZEMAN	0.37%
MILES COMMUNITY COLLEGE	-0.43%

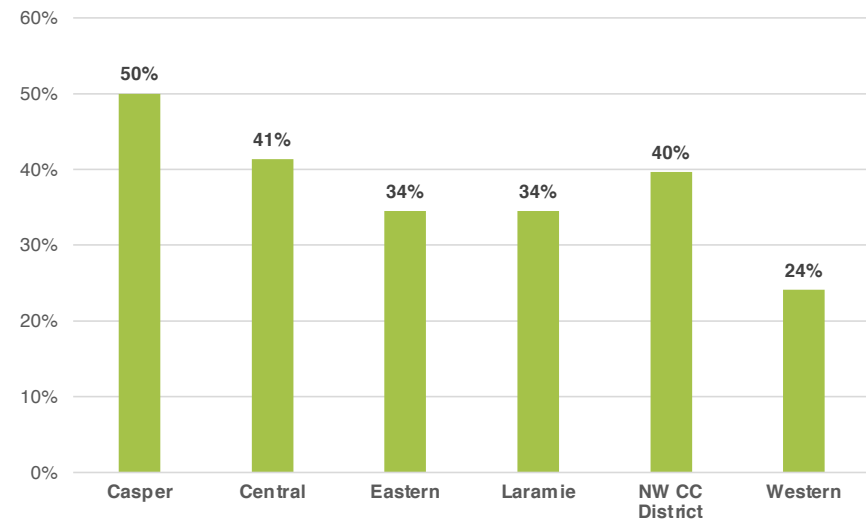
Source(s): National Student Clearinghouse Data, NWC Applicants, Declined Admissions, 2016-2020; CampusWorks Analysis, 2021

ACADEMIC PROGRAMMING OVERLAP

Percentage of Overlap of Associate Degree Programs with Northwest College



Percentage of Overlap of Certificate Programs with Northwest College



Source(s): IPEDS; College Websites and Academic Catalogs; CampusWorks Analysis

NORTHWEST COLLEGE PROGRAMS WITH LEAST OVERLAP WITH WY CC'S

- Agroecology
- Agricultural Education
- Archeological Technician
- Aviation/Aeronautics
- Outdoor Recreation
- Music Technology
- Veterinary Assistant

NORTHWEST COLLEGE PROGRAMS WITH MOST OVERLAP WITH WY CC'S

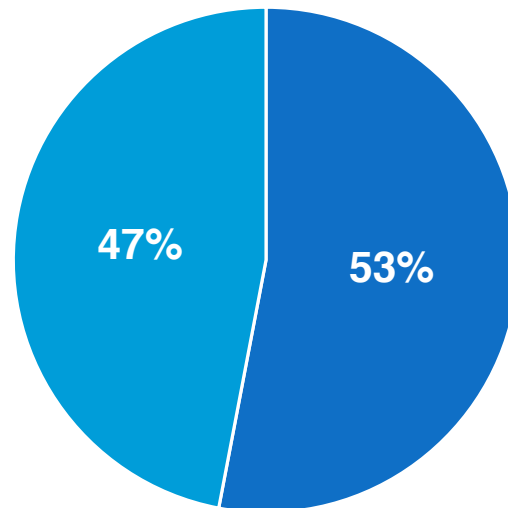
- Business Administration
- Welding
- Biology
- Criminal Justice
- Mathematics
- Nursing
- General Studies/Liberal Arts
- Art
- Accounting
- English

OUT-OF-STATE/VIRTUAL COMPETITION

Who is Northwest College's
Competition?

OUT-OF-STATE ONLINE ENROLLMENT GROWS FOR WYOMING RESIDENTS

Wyoming Out-of-State Online Headcount
Graduate & Undergraduate Enrollment
Fall 2016-Fall 2019



■ Top 11 Institutions ■ All Other Institutions

Wyoming ranks
#3
among states with highest number of
enrolled residents taking online courses
outside the state

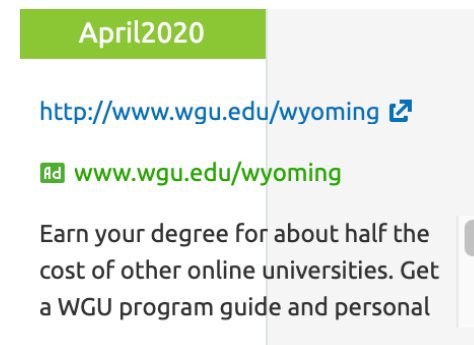


+4.4%
Overall Growth in
Out of State Online Enrollments from
Wyoming
Fall 2016 to Fall 2019
(includes undergraduate and graduate programs)

OUT-OF-STATE ONLINE PROGRAMS TARGET WYOMING COMMUNITY COLLEGE MARKETS

Top 11 Institutions in Fall 2019	# of Wyoming CCs Targeted
Western Governors University	5
Grand Canyon University	4
American Public University System	1
Southern New Hampshire University	2
University of Phoenix	4
Black Hills State University	n/a
Chadron State College	n/a
Liberty University	0
Colorado State University-Global Campus	1
Brigham Young University - Idaho	n/a
Ashworth College	2

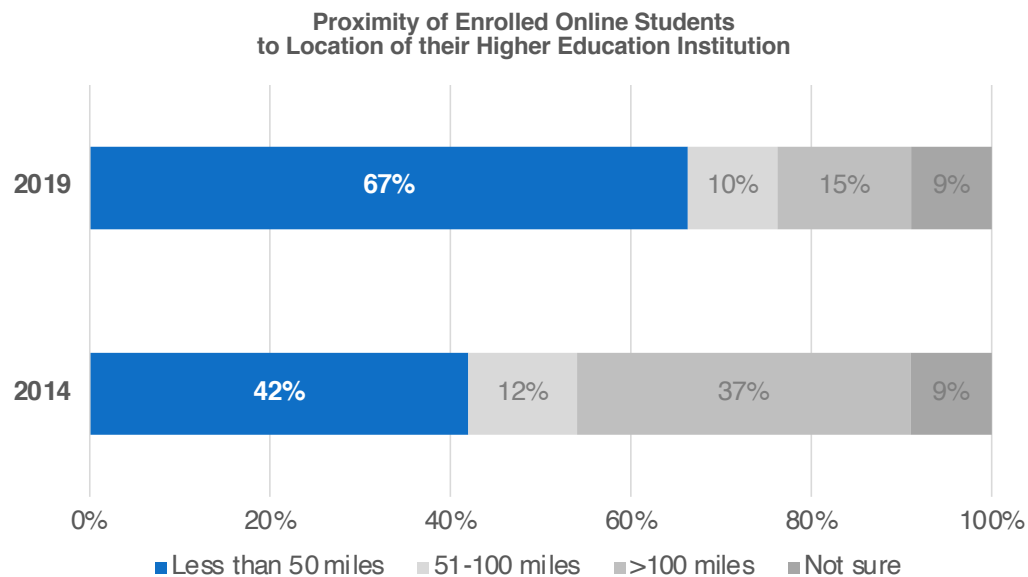
- 7 of 11 Out-of-State Online Programs targeted key search terms belonging to Wyoming community colleges
- Paid ads targeted general online course taking and specific academic programs



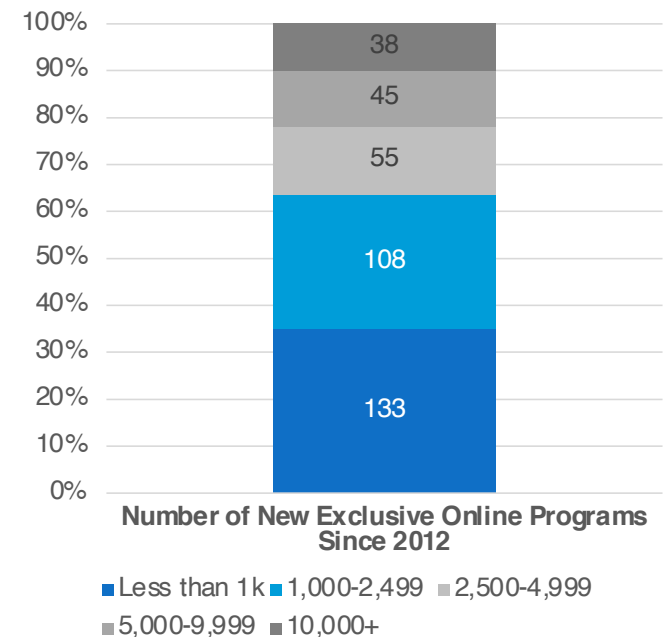
Sample Ad from Western Governors Placed on Northwest College's Search Page in April 2020

ONLINE EDUCATION STILL GROWING & LOCAL, BECOMING STANDARD PART OF HIGHER ED

More students attend online programs closer to home



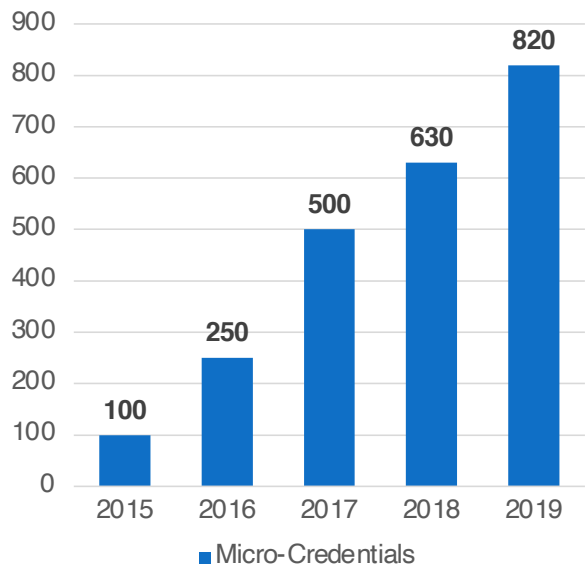
Since 2012, majority of institutions adding online degree programs from smaller institutions (63%)



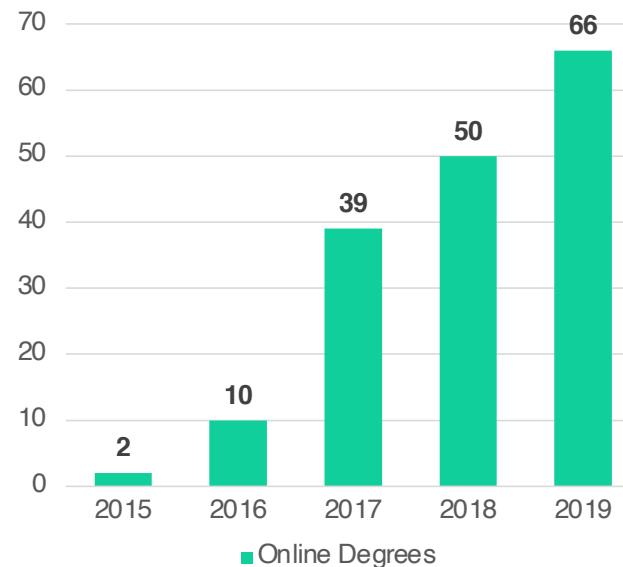
Source(s): The Learning House, Online College Student Survey, 2019; CampusWorks Analysis, NC-SARA Online Enrollment; National Center for Education Statistics, IPEDS, Institutions Offering Exclusively Online Programs, 2012-2018.

ALTERNATIVE CREDENTIALS GROWING IN LAST 5 YEARS

Micro-Credentials from Top 4 MOOC Providers



Online Degrees from Top 4 MOOC Providers



MOOC Distribution by Subject (2011-2018)

1. Technology (20.4%)
2. Business (18.2%)
3. Social Sciences (11.5%)
4. Humanities (9.4%)
5. Science (9.4%)
6. Education (8.6%)
7. Health (7.2%)
8. Engineering (7.0%)

Source(s): Class Central, MOOCs Year in Review, 2020.