



INSTITUTIONAL TRANSFORMATION

February
Board Meeting

OVERVIEW OF INSTITUTIONAL TRANSFORMATION PROCESS

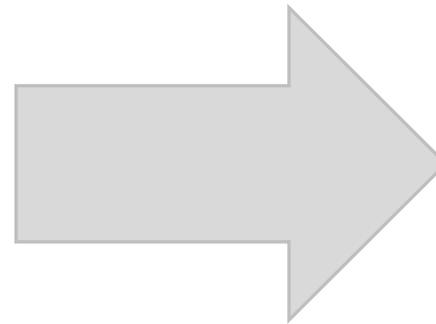
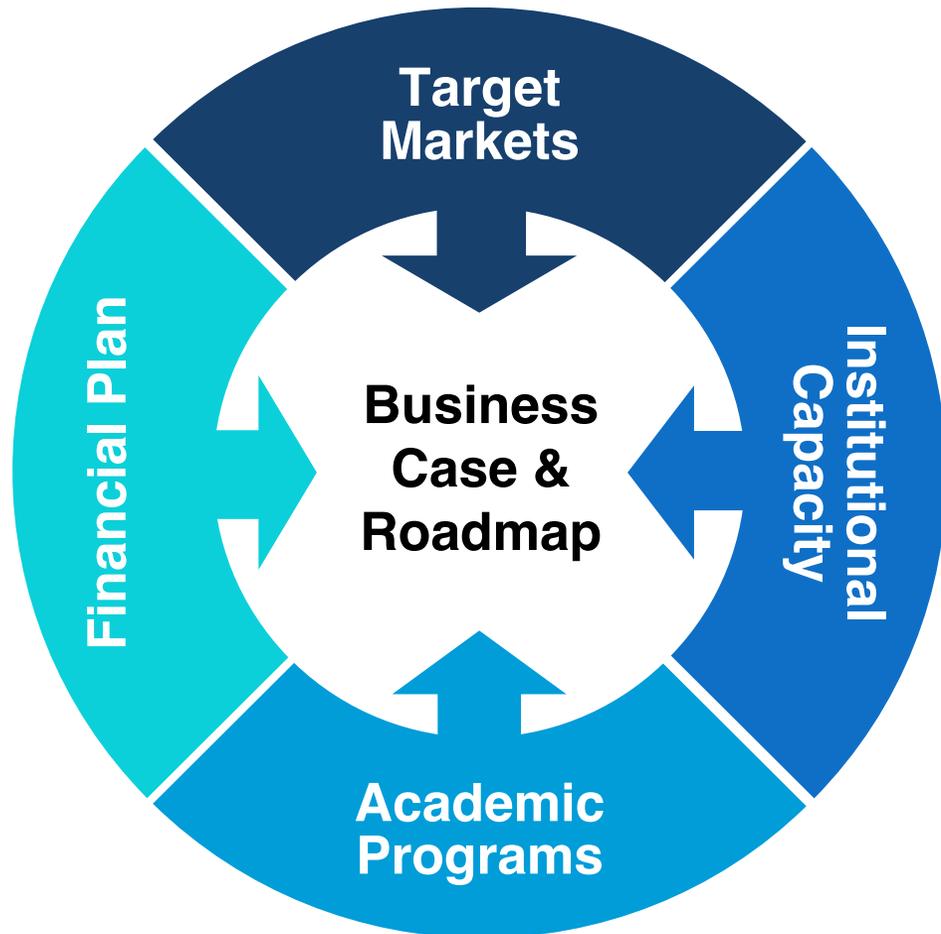
Phase 2 and 3

PHASE 1 & 2 IDENTIFIES MARKET OPPORTUNITIES



The collective visioning and scanning phases will clarify what NWC's market opportunities are and how to position NWC in the external market.

PHASE 3 BUILDS COLLABORATIVE ROADMAP FOR MARKET POSITIONING



Align College's Value Proposition & Offerings with Target Markets through Recruitment, Branding & Marketing

KEY DECISION FRAMEWORK FOR TRANSFORMATION

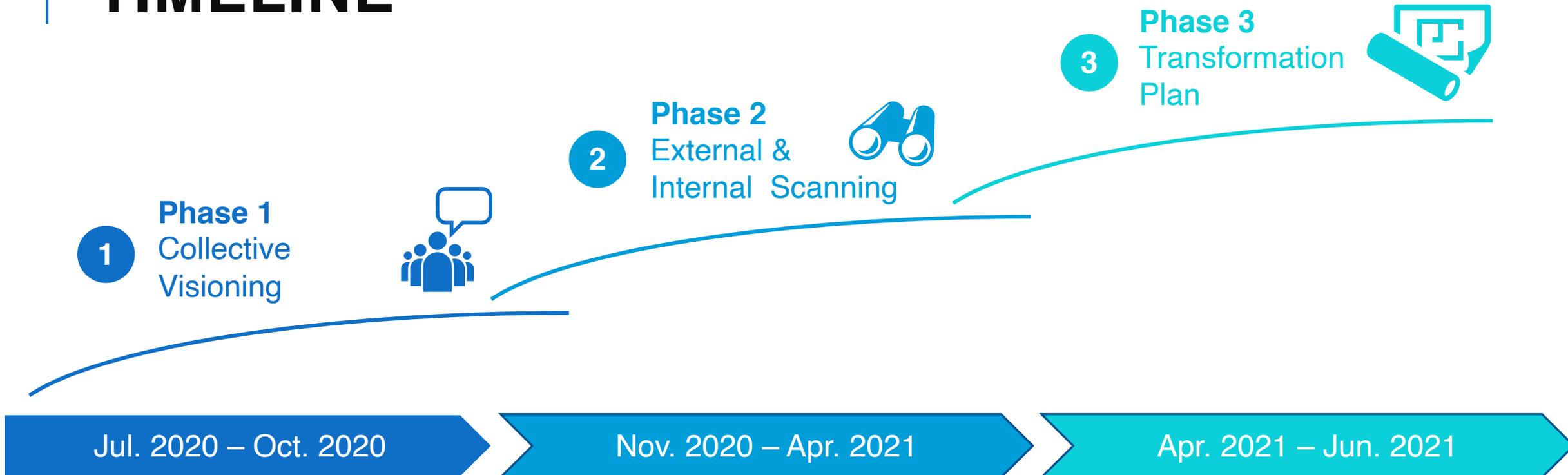
1 Where will you compete? How will you win?

- Academic Programs & Services
- Enrollment & Marketing
- Student Success

2 What assets & capabilities will you need to compete in the marketplace?

3 How will the College position its brand & identity to align its value proposition?

INSTITUTIONAL TRANSFORMATION TIMELINE

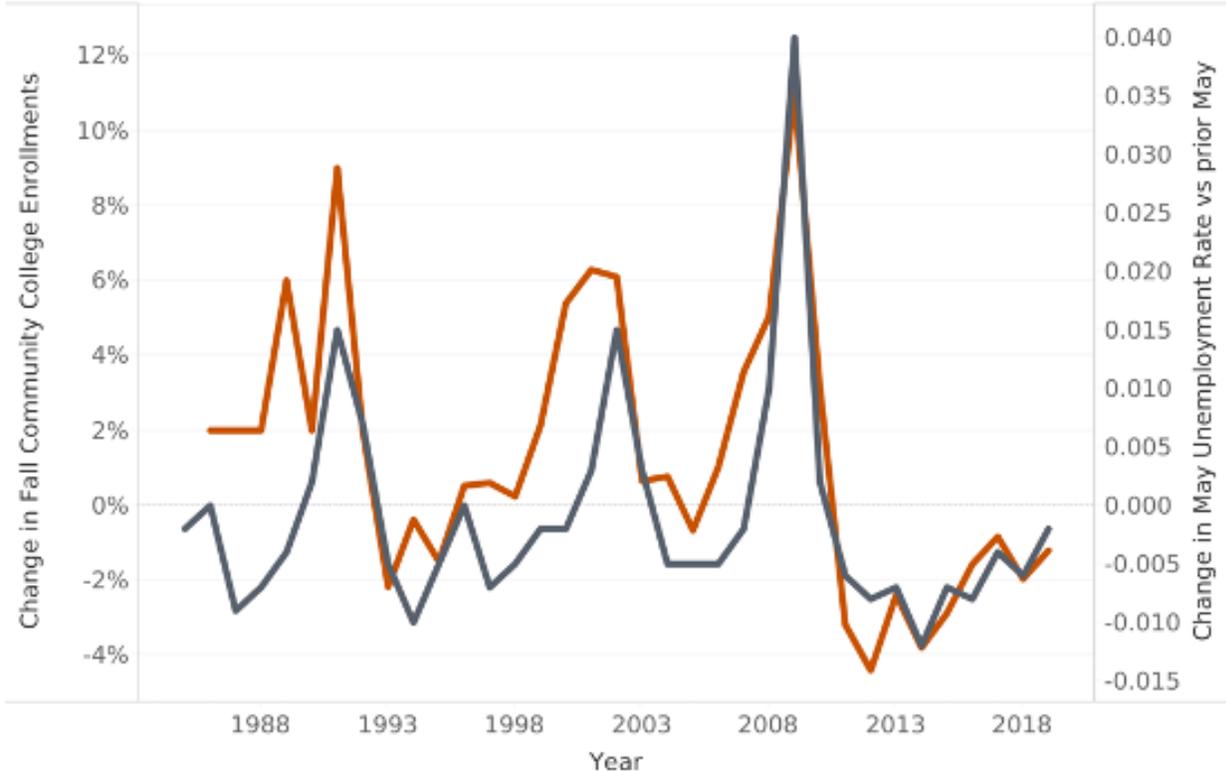


STUDENT SEGMENTS AND DEMOGRAPHICS

First Look into Demographics
Driving Trends at Northwest
College

COMMUNITY COLLEGE ENROLLMENTS HAVE HISTORICALLY MIRRORED UNEMPLOYMENT

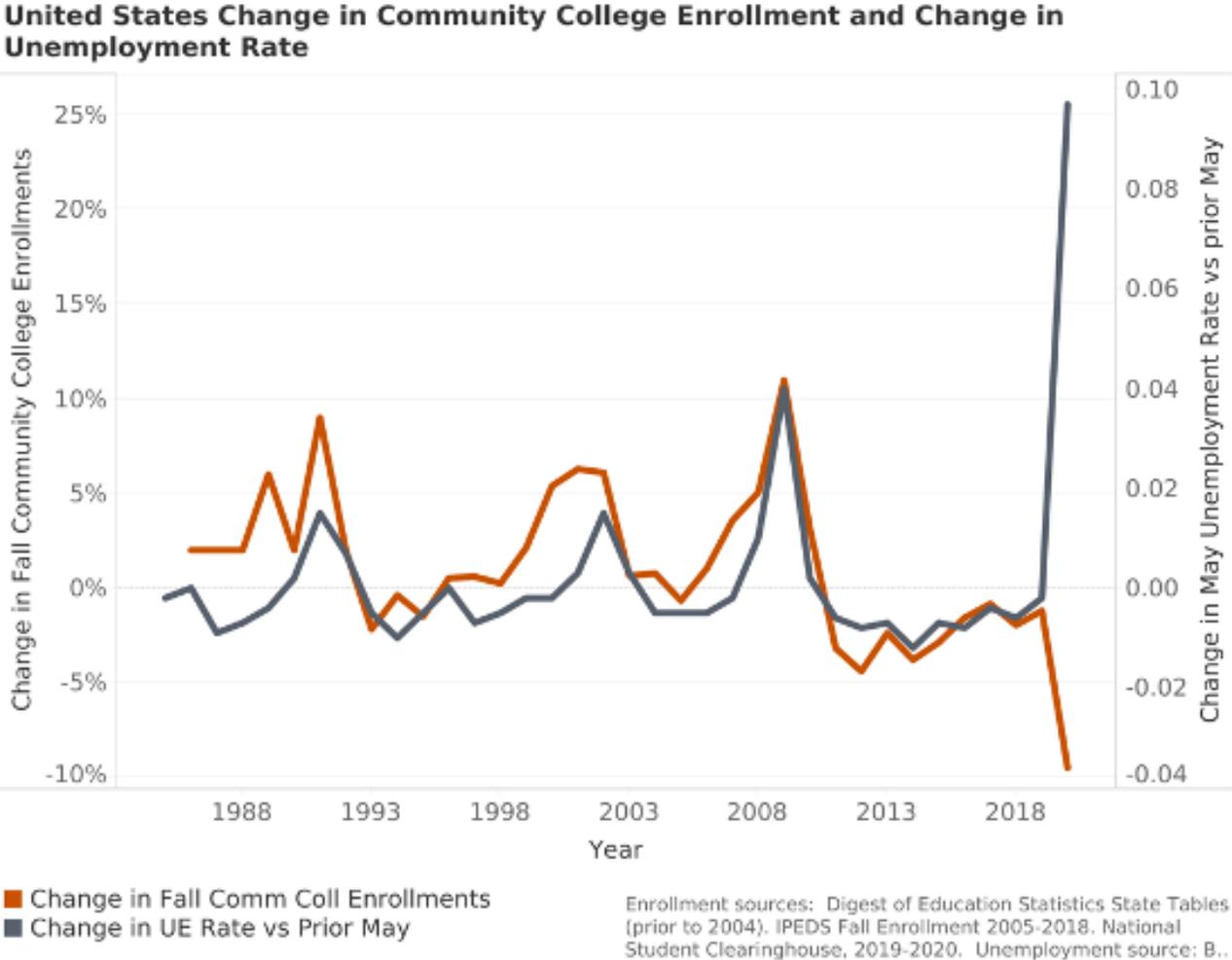
United States Change in Community College Enrollment and Change in Unemployment Rate



■ Change in Fall Comm Coll Enrollments
■ Change in UE Rate vs Prior May

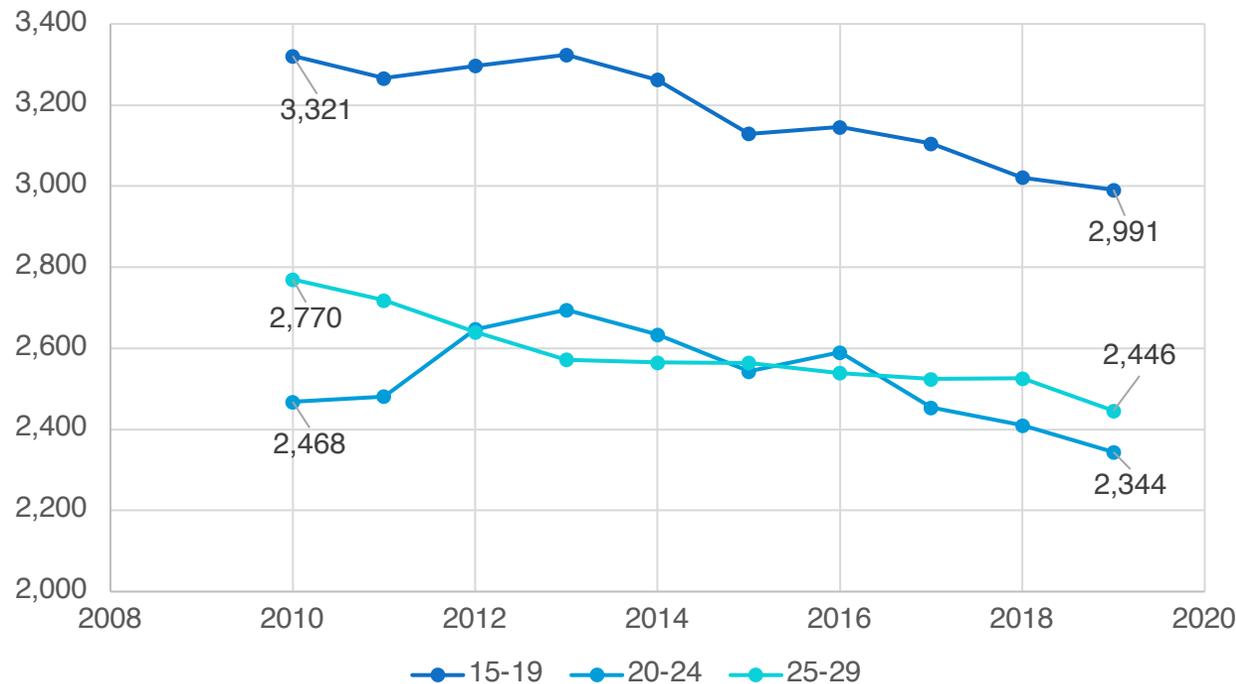
Enrollment sources: Digest of Education Statistics State Tables (prior to 2004), IPEDS Fall Enrollment 2005-2018, National Student Clearinghouse, 2019-2020. Unemployment source: Bureau of Labor Statistics

...EXCEPT WHEN COVID-19 OCCURRED



NORTHWEST'S SERVICE AREA SAW LOSS IN YOUNG ADULT POPULATION LAST DECADE

Northwest College Service Area Population by Age, 2010-2019
(Park, Big Horn, and Washakie Counties)



Age 15-19: - 1.1%

Age 25-29: -1.2%

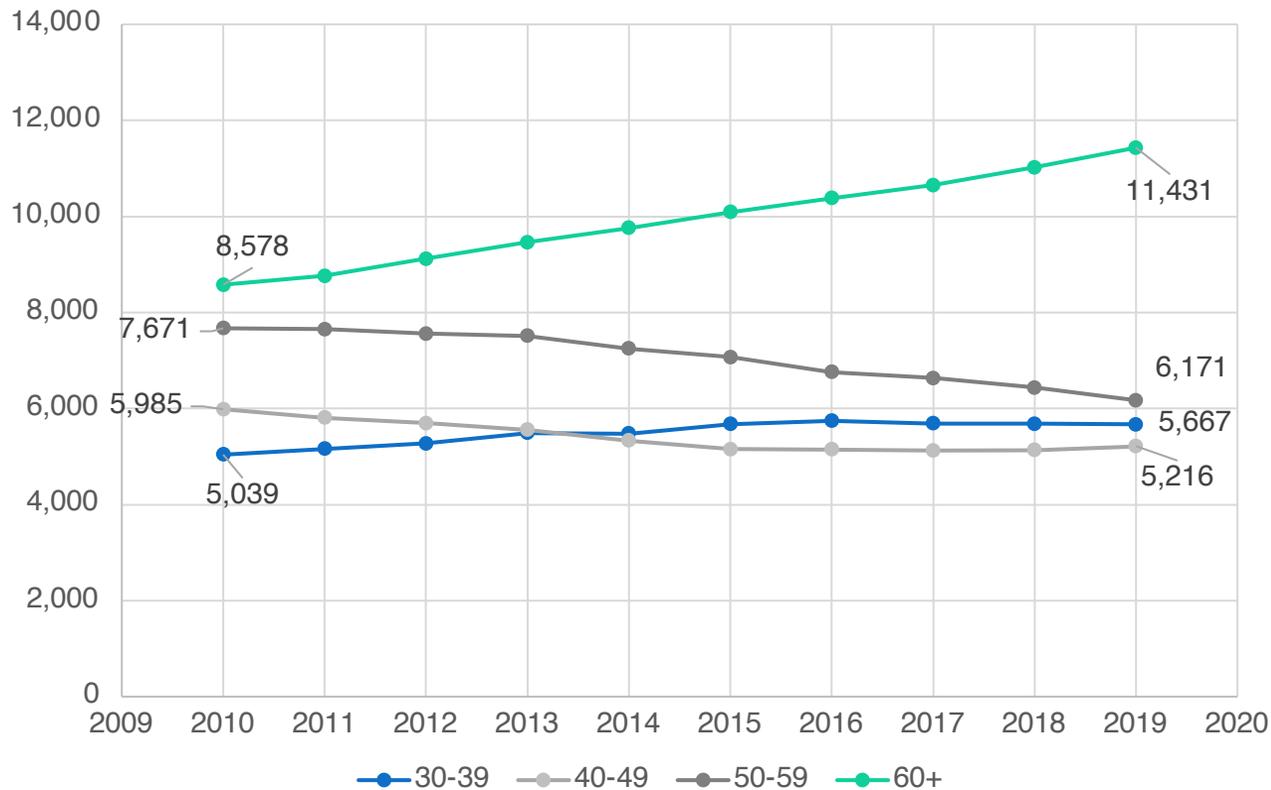
Age 20-24: -0.5%

NWC Fall Enrollment by Age
(CAGR '11-'20)

19 and under	-1.21%
20-24	-6.11%
25-29	-6.09%
30-39	-6.86%
40-49	-6.91%
50-64	-9.74%
65+	-3.31%
Total	-3.86%

LATE & MID CAREER ADULTS GREW IN LAST DECADE

Northwest College Service Area Population by Age, 2010-2019
(Park, Big Horn, and Washakie Counties)



Age 60+: +2.9%

Age 50-59: -2.1%

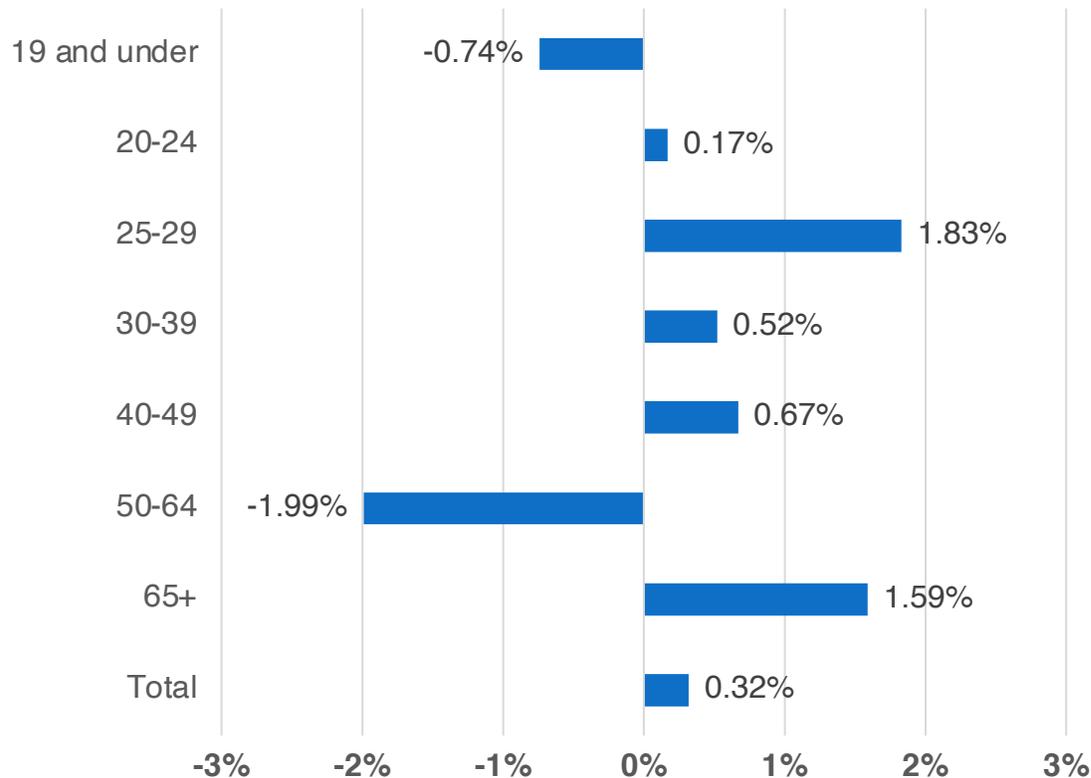
Age 30-39: +1.2%

Age 40-49: -1.3%

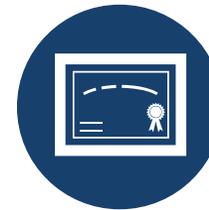
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EARLY/MID CAREER ADULTS & RETIREES EXPECTED TO GROW BY 2030

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

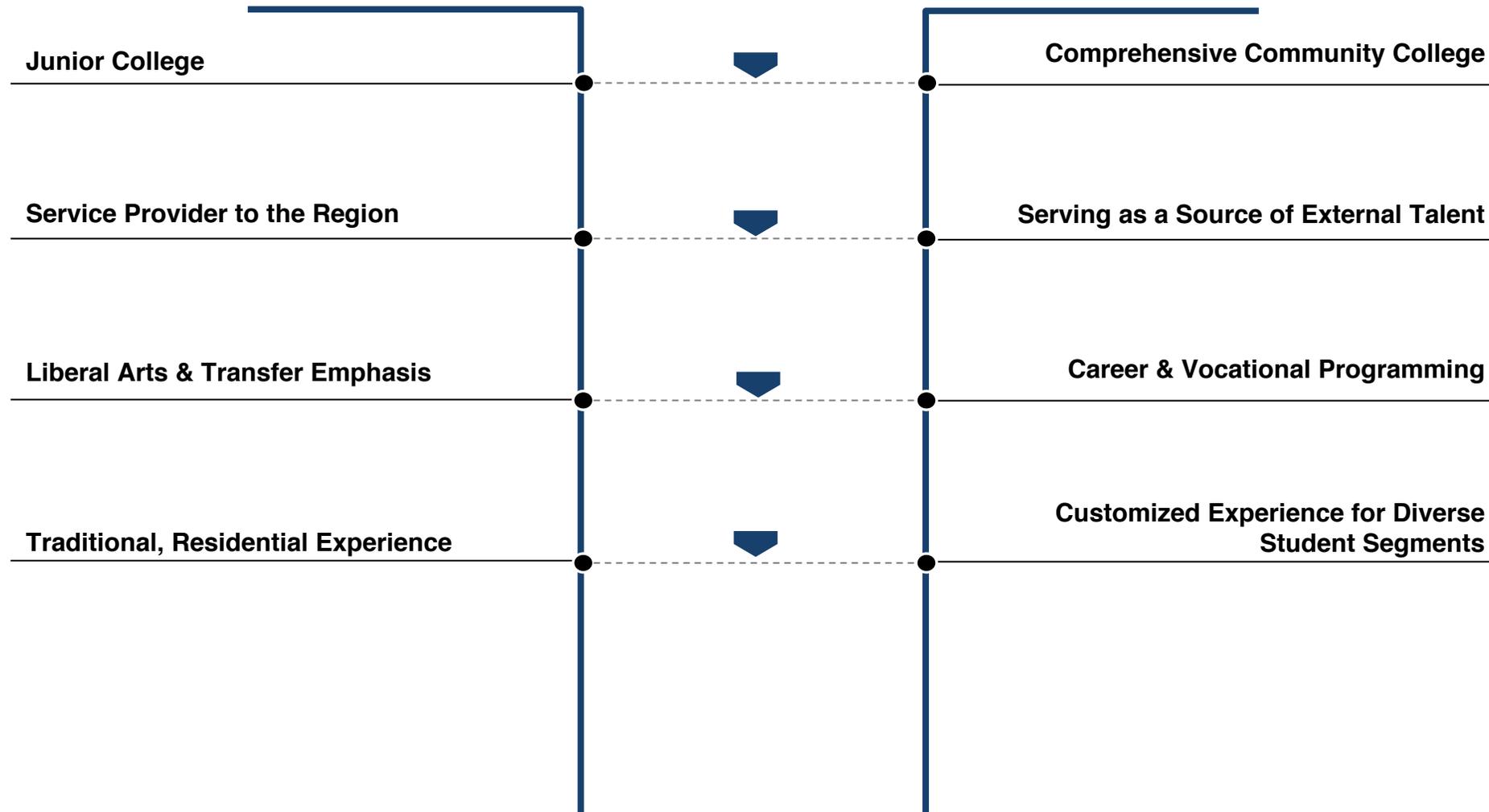


Lifelong Learners



Career Advancers

THINKING ABOUT NORTHWEST COLLEGE'S IDENTITY



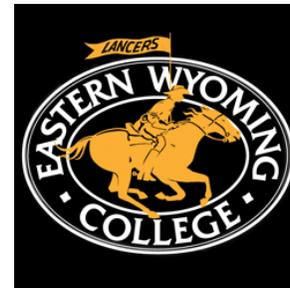
STRATEGIC CONTEXT

Looking at the Core Model
through the Lens of Industry
Trends

TRADITIONAL COMPETITIVE LANDSCAPE

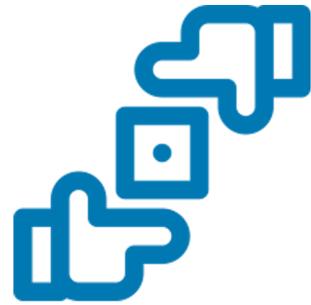


Casper College



NEW COMPETITIVE LANDSCAPE

TRADITIONAL COMPETITIVE LANDSCAPE + EMERGING TECHNOLOGIES/PARTNERSHIPS



From the
Student
Perspective

Learning & Skill Development

Verifying Skills & Experience

Bootcamps & Immersion

Short-term, intense training sessions



Micro-Credentials

Proof of competency in targeted area



Digital Apprenticeships

Focus on mentoring & experience



MOOCs

Open online courses & credential paths



Vocational

Job-specific skills development



Workplace Training

Upskilling platforms & corporate training



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



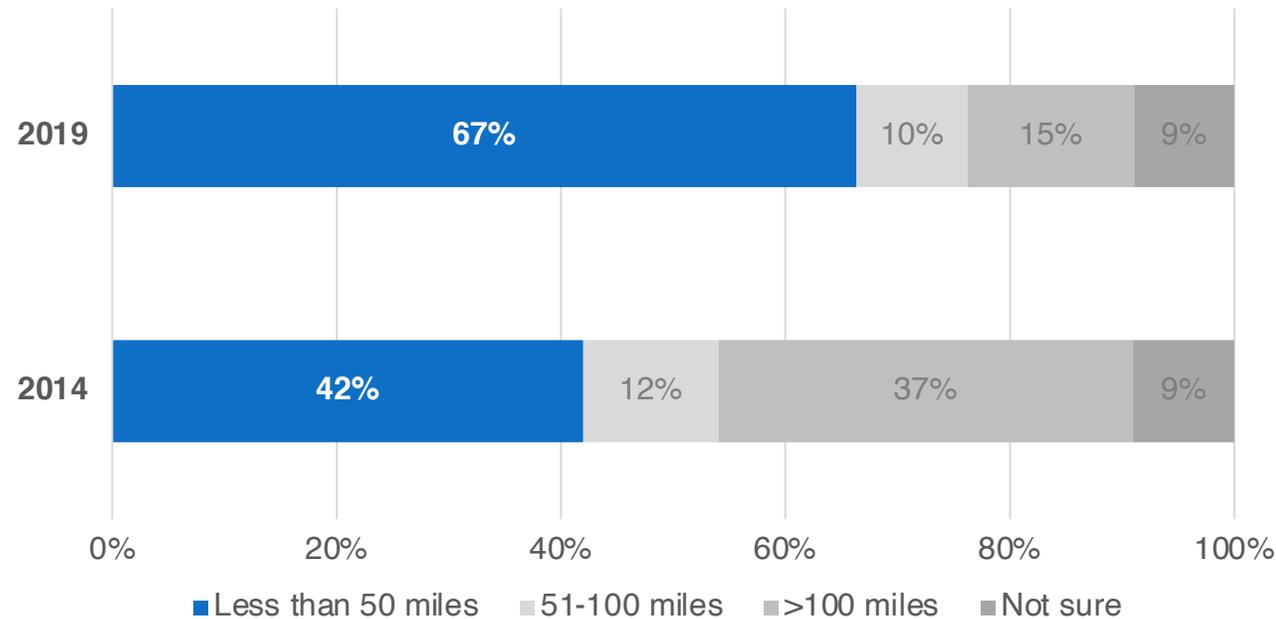
Explosive Growth of MOOCs and OPMs

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

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

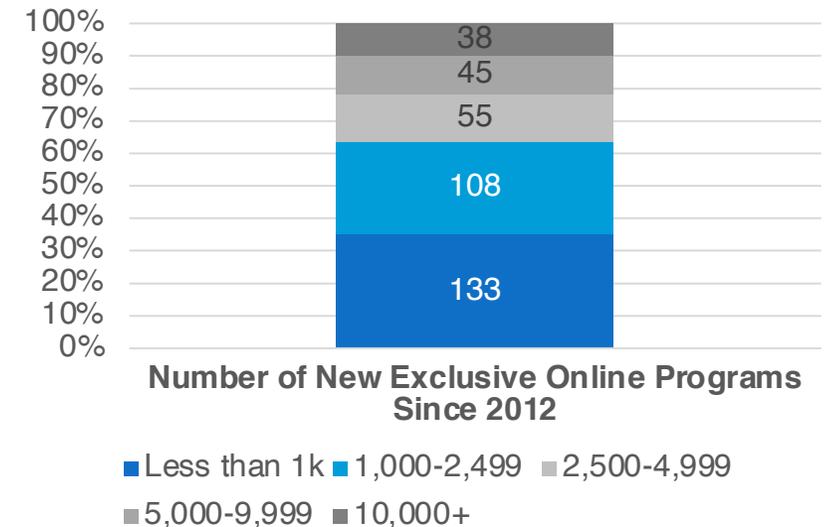
More students attend online programs closer to home

Proximity of Enrolled Online Students to Location of their Higher Education Institution



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

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



CORE IDEA MODEL OPTIONS NORTHWEST COLLEGE



Destination Model

Provide a distinctive learning experience for those seeking to enjoy, work and live in the Yellowstone ecosystem.



Workforce Hub Model

Serve as an engine and agenda-setter for regional talent development and growth through strategic alliances and coalitions.



Pathways Model

Provide a flexible and engaging education pathway accessible at every stage of life.



Distinctive Program Model

Serve as a source of authority and reputation leader in targeted programs or learning practices.

CORE MODEL OVERVIEW

	Emphasis of Model	Potential Market Segments
Destination	Leverages the Yellowstone ecosystem to provide immersive learning experiences	Out-of-State Students Experience Seekers International Students
Workforce Hub	Emphasis on accelerating skill accumulation through strategic workforce partnerships	Adult Learners Ed2B Partnerships
Pathways	Digital and hybrid experience that breaks traditional courses into smaller units of study	Online Students Guest Students Adult Learners
Signature Program	Emphasizes mode of learning or academic specialty as differentiator and source of quality	Traditional, Residential Niche Population(s)

NEXT STEPS

Where will you compete and how will you win?

- **Further Discussion on Core Models**
- **Additional Data Provided on Student Demographics & Markets**
- **Labor Market & Competitive Landscape**