



Transformation
Collaborative



Transformation as the Path to Surviving and Thriving in a Hyper-Change World CECU, 2023

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Wallace K. Pond, Ph.D. Founder and CEO, Transformation Collaborative™*

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From the Case Study to the Sector

Transformation

The Path Forward | How We Got Here | The Opportunity |

The Nature of Transformative Change

“

Every person, organization, and even society reaches a point at which they owe it to themselves to hit refresh—to reenergize, renew, reframe, and rethink their purpose.

”

Satya Nadella, CEO, Microsoft

Definition

Transformational change is a *radical departure* from the status quo in an organization, leading to foundational changes in the *nature* of the entity. This can be cultural, structural, behavioral, the business model and market, product strategy and even the organization's mission and purpose.

Unlike transactional or incremental change, transformational change requires a deeper focus on culture, mission, and motivation, and often goes to the core of why people are in the organization to begin with.

The Simple Reality

- You cannot make incremental changes to your plan when every foundational assumption on which it was based has changed.

Need Proof?

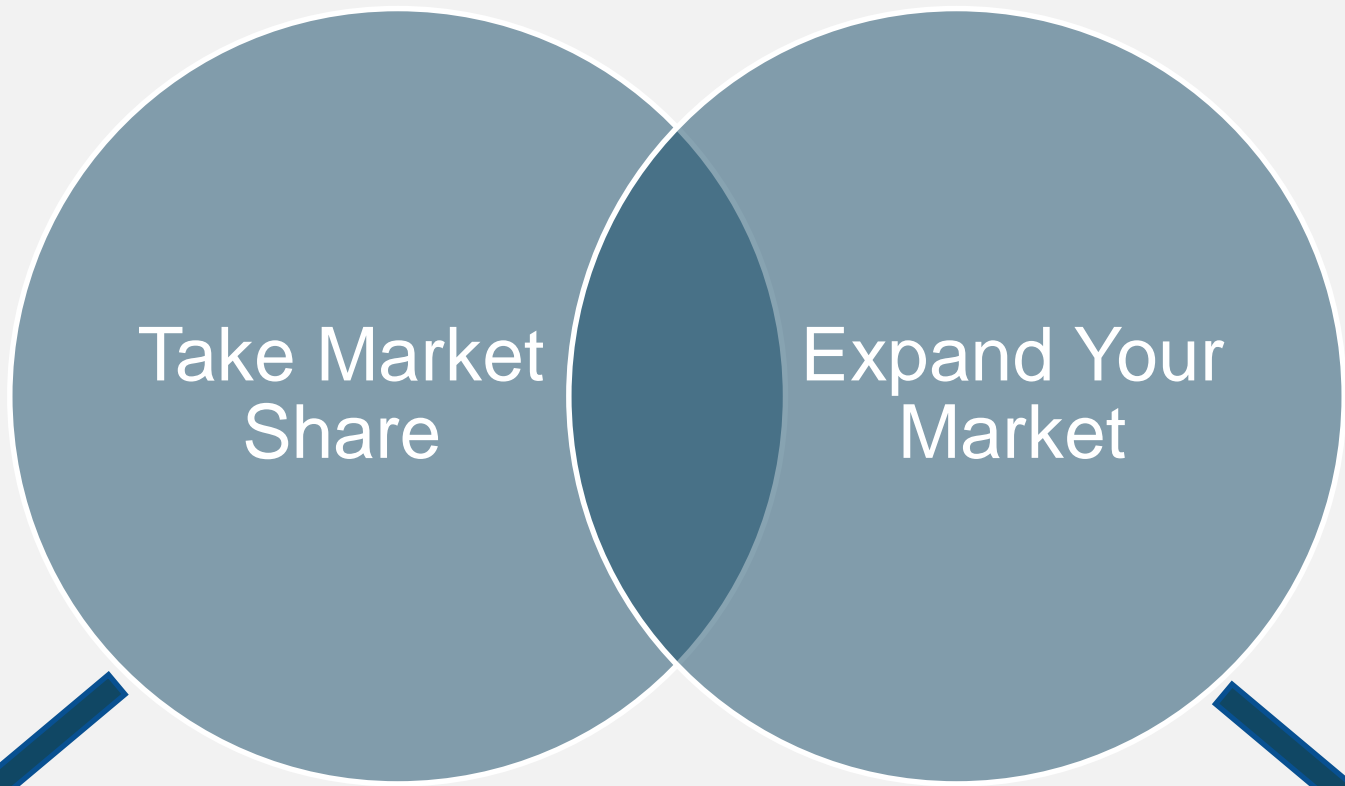
- Over 1,000 sector closings since 2010
- Over 1,900 site closures across all sectors since 2010

Historical Reality	Current Reality
More Demand than Supply	More Supply than Demand
Publicly Funded	Privately Funded
Monopoly Access	Market Access
Exclusive Credential	Commodity Credential
Positive Public Opinion	Skeptical Public Opinion
Price Elasticity	Hard Price Ceiling
Limited Internal Competition	Unlimited External Competition
Fixed Academic Calendar	Just in Time Offerings
Growing Customer Market	Shrinking Customer Market
Policy Driven	Market Driven

Deepening Trends – Opportunity or Threat?

- Decline in 2 and 4 yr enrollments (CC enrollments down 37%!!!)
- Growth in non-credit market
- Increase in number of college dropouts
- Growth in combined program models: Guild, Grow with Google, etc.
- Worsening demographics
- Worsening public opinions about the value of higher education
- Shift away from college degrees as employment credential
- Persistent resistance to proprietary education by some regulatory entities and policy elites

There Are Only Two Ways to Succeed Now



Value Proposition

PSE vs. Higher Ed

The Biggest Difference...

Then

Policy



Now

Market

“Your future has relatively little to do with gov’t policy and regulation and a great deal to do with market forces.”

Why Transformational Change Is So Rare

- It requires people to go against their natural tendencies.
- It requires a level of transparency, honesty, and compromise foreign to most organizations.
- It requires a level of leadership commitment that most leaders have not experienced.
- It requires skills that most leaders don't have.
- It takes a longer-term commitment than most of organizations are used to.
- It's high risk (although no higher than continuing to operate under the status quo!)

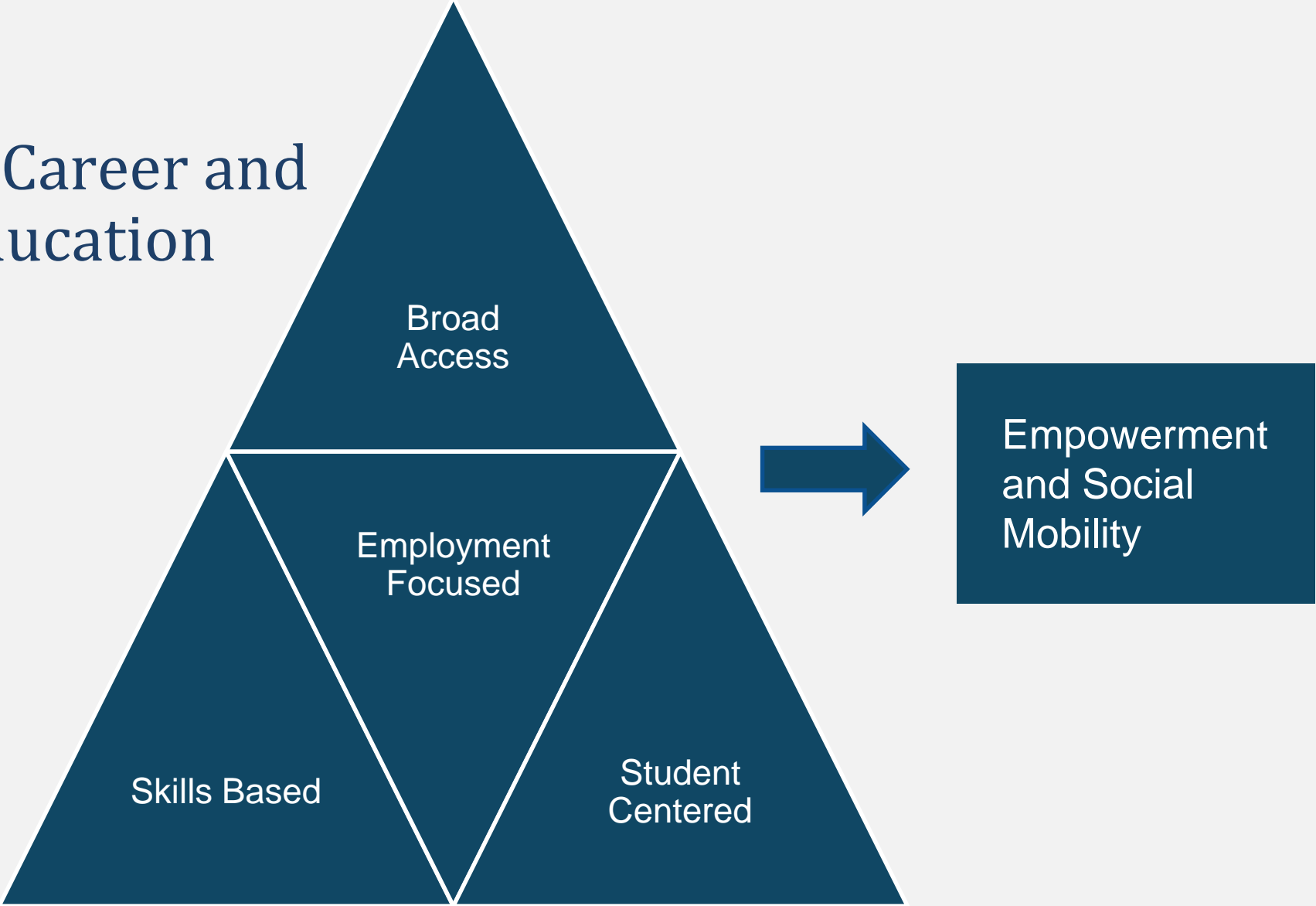
Very few executive leaders or even leadership teams have the bandwidth or ability to run the daily operation, manage through disruption, and build for the future all at the same time, let alone build for a transformed future. It just demands more than most leaders have ever had to do.

“

Reinvention is so challenging that, within higher education, most institutions will choose to fail over choosing to change.

”

Strengths of Career and Technical Education



What We Keep and What We Change

The Sacred	The New
Employment Skills and Applied Curriculum	Lifespan Skills and Relationship
Access	Workforce Development / Partnership
Student Focus / High Touch	Extension of Industry
Career Services	Post Secondary Ecosystem

Value Proposition | Product Strategy | PSE Leadership | Market Validation

Reinventing the Past for a Better Future

Legacy Value	Reinvented
Career Skills	Non-Credit, Combined, and Stackable
Applied Curriculum	Apprenticeship/Internship from the Beginning for All Programs
Industry Focus	Workforce Development, Industry Developed Curriculum
Hi Touch	Digital, Remote, Low-Friction
Social Mobility	Little or No Debt with Life-Long Improvement

A New Definition of Winning

We must redefine how the career college sector brings value to students, employers and society. Simply put, we win by becoming *indispensable*.

The Case Study



Politics| Growth| Operations| Economics

Institutions Pre-2015



- Admissions-Minded
- Programs Followed Sector Trends, Not Industry Demand
- Campuses were Dingy
- Faculty were Uninspired
- Leaders were Can't-Do
- Internal Communication was Minimal
- Student Outcomes Barely Scraped By
- Community Involvement was Non-Existant
- Political Leaders Never Heard of Us
- Unprofitable

No
Mission

Seven Strategic Goals



1. Reputation and Record



2. Community Outreach



3. Faculty Engagement and Staff Morale



4. Enrollments



5. Program Development

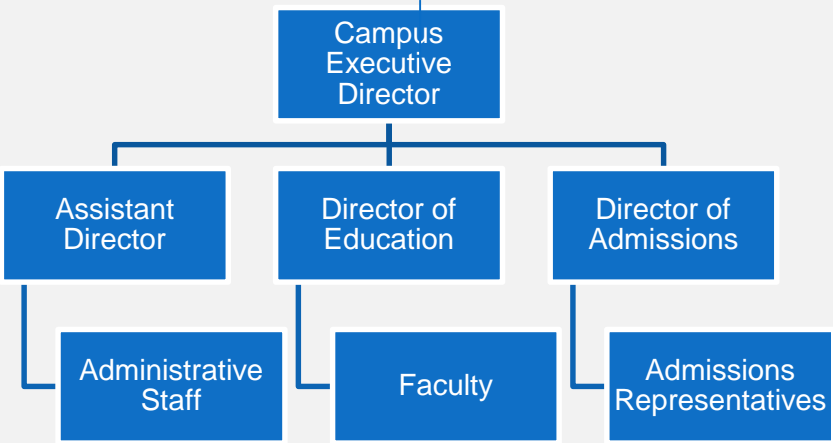
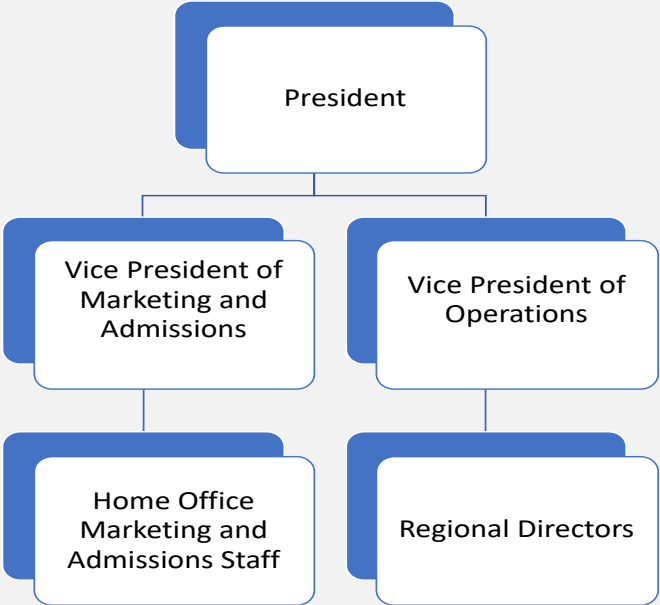


6. Online Learning and Classroom Innovation

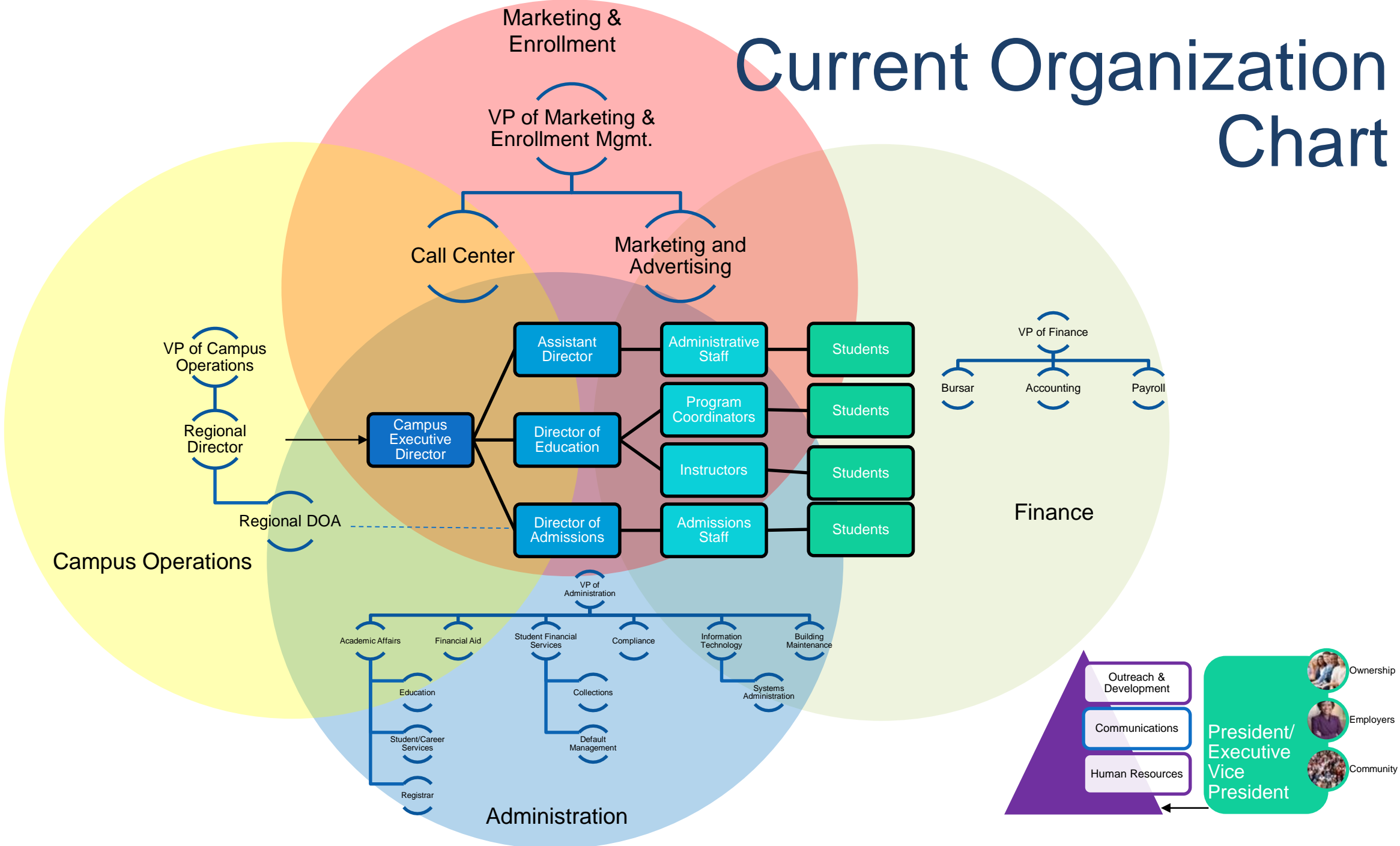


7. Campus Expansion

Prior Organization Chart



Current Organization Chart



Which Wendy's is Better?



Which Gym is Better?



Which Public Transportation is Better?



Which Doctor is Better?



Which Aviation School is Better?



1. Reputation and Record

- Make the schools look great.
- Improve retention and employment rates.
- Add financial advising to improve default rates.
- Stop accepting lame job positions as “placed in field.”
- Focus on student certification rates.

Certification Rate, 2014-2022

Year	AIM Grads	A&Ps	A&P Rate	Total A&Ps Certified	A&Ps Certified from All Schools	Percentage from AIM
2014	1,034	358	35%	7,216	4,210	9%
2015	1,139	450	40%	6,366	3,842	12%
2016	1,215	495	41%	5,856	3,689	13%
2017	1,304	645	49%	6,401	4,033	16%
2018	1,188	715	60%	6,706	4,184	17%
2019	1,450	983	68%	7,360	4,720	21%

70% of Graduates Become Certified

25% of All A&Ps from Schools come from AIM



Graduate Employment



Graduate Employment Board

October 2020 - October 2021



Dion G. Granger
Certified A&P Mechanic



Christopher D. Lahat, Jr.



Emmanuel Arboleda



Carl Azulphar



Angelique M. Baker
Certified A&P Mechanic



Horatiu Bartos
Certified A&P Mechanic



Steven J. Bussone
Certified A&P Mechanic



Gilbert Rodriguez, Jr.
Certified A&P Mechanic



Austin M. Chase
Certified A&P Mechanic



Ryan C. Eric
Certified A&P Mechanic



Joshua K. Bootz
Certified A&P Mechanic



Shamoy D. Charles



Joshua K. Maynard
Certified A&P Mechanic



Jamal T. Anduze



Juan M. Nolasco



Devonian C. Pinner
Certified Airframe Mechanic



Dakota R. Cannella
Certified Airframe Mechanic



Mitchell D. Klaus
Certified A&P Mechanic



Mahadeo J. Basdeo



Isalah D. Bayron



Jeremy Ducasse



Ashley Fargas



Nick Diaz
Certified A&P Mechanic



Eric D. Robinson



Horacio A. Morfin Amador



Lewis A.



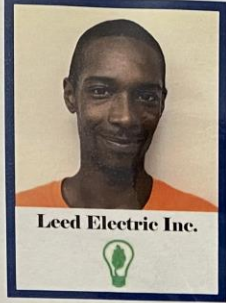
Kristian Singh
November 2020



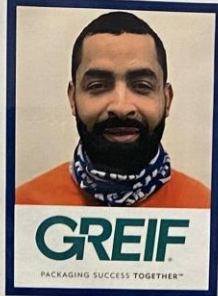
Maksim Saltov
December 2020



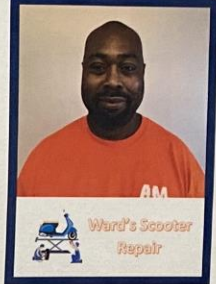
Joseph Campo
November 2020



Tomas Rios Melendez
November 2020



Michael Ward
July 2021



Joshua Brewer
July 2021



Jonathan Fitzberger
June 2021



Matthew Lee
June 2021



Treston Maurer
June 2021



Rebecca Lynne
July 2021



Sam Xiong
August 2021



Joseph Jones
August 2021



Trissan Vereen
August 2021



Vanessa Mota
September 2021



Robert Walker
September 2021



Jeremy Dauber
September 2021



Oleksandr Savenko
September 2021

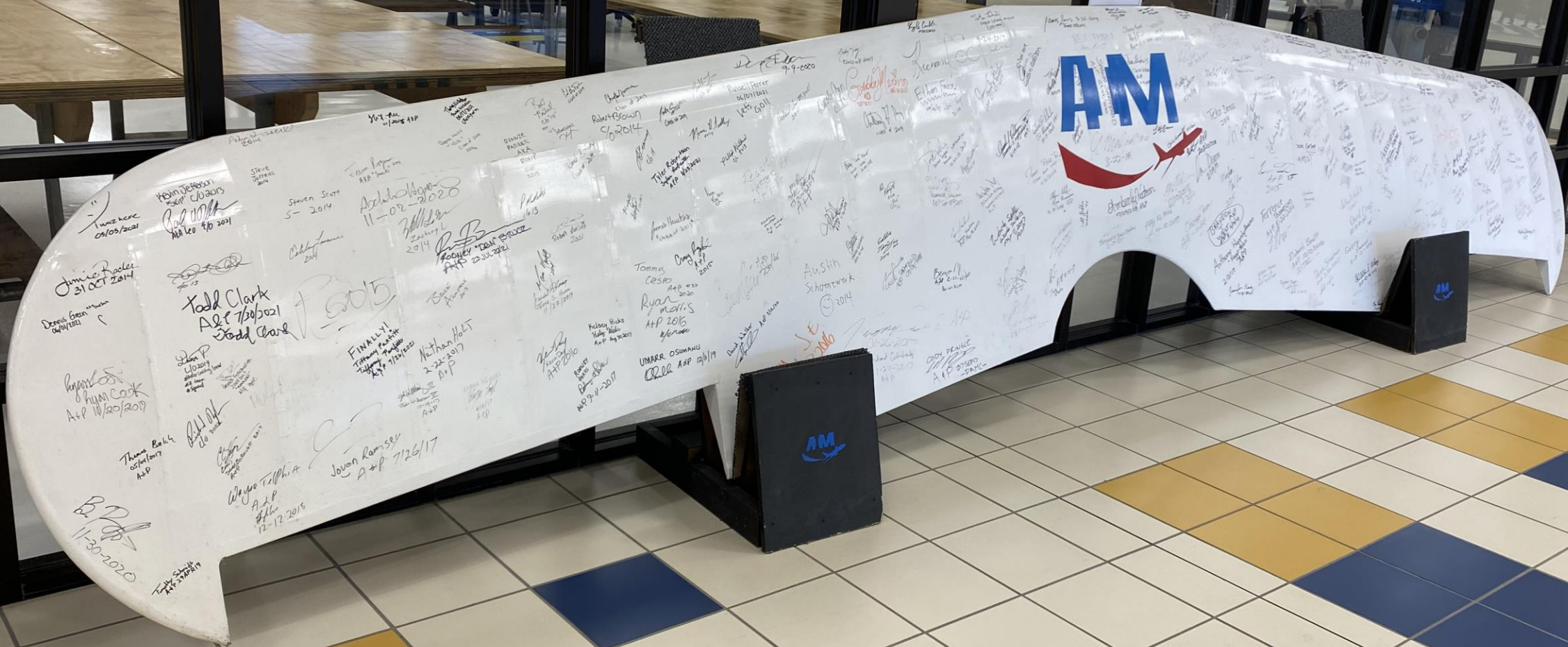


Joshua Wolfe
September 2021



Joseph Jones August 2021





AM
Aerobically Modified
Aerobically Modified

The A&P Wing
From our graduates who have
graduated from A&P and have
gone on to graduate from
university to sign this wing

I was here
05/05/2021

Kevin Johnson
SEP 01/2015

Steven Scott
5-2014

Asadul Hossain
11-02-2020

Todd Clark
A&P 7/30/2021

Todd Clark
A&P 7/30/2021

2015

Nathan Holt
2-22-2017

Raymond
A&P 10/20/2019

Thomas Rault
A&P

Wayne Telford
A&P
12-12-2015

Jovan Ramsey
A&P 7/26/17

B.P.
11-30-2020

Tony Smith
A&P 2/20/19

UMARR OSMANU
A&P 12/1/19

AM

AM

- General 52
- Matthew Cororan 11/21
 - Stephanie Ackemann 11/21
 - Jason Snow 11/21
 - Michael Kriner 11/21
 - Jonathan Alibudud 10/21
 - Mickey McCullough 10/21
 - Waldemar Raczynski 10/21
 - Johnson Bertelano 10/21
 - Ernest Watts 10/21
 - Jessica Hardy 10/21
 - Brandyn Nicholas 10/21
 - Zachary Smith 09/21
 - Cassius West 08/21
 - Riley Percy 09/21
 - Wall Washburn 08/21
 - Mark Kowalk 08/21
 - Tyler Robertson 08/21
 - Thomas Nicholson 08/21
 - Forrest Poor 08/21
 - Todd Clark 07/21
 - Tiffany Parfitt 07/21
 - Rodney Bruce 07/21
 - Robert Smith 07/21
 - Austin Meadows 07/21
 - Switz Hay 06/21
 - Paul Henderson 07/21
 - Bergio Tapia 07/21
 - Kenneth McIntosh 07/21
 - Mackinley Deveney 07/21
 - Antonio Carrigan 07/21
 - Zachary Lindsay 07/21
 - Jonathan Meyers 08/21
 - Cameron Hickman 06/21
 - Nicholas Brucker 05/21
 - Jacob Carson 06/21
 - Russell Ferrer 06/21
 - Dennis Green 05/21
 - Daniel Harris 05/21
 - Teresa Castlow 04/21
 - Robert Ruff 04/21
 - Benaki Gray 04/21
 - Gabriela Marino 04/21
 - Ethan Farrow 04/21
 - Harry Dugan 04/21
 - Michael Porter 03/21
 - Robert Hicks 01/21
 - Jeffrey Hedrick 01/21
 - Paul Little 01/21
 - Robel Tefera 01/21
 - Stephen Lebeck 01/21
 - Aubrey Ashman 01/21

1

The Countdown Begins!!!
9,8,7,6,5,4,3,2,1



2021
THE YEAR WE
SIZZLE



Certification Rate, 2014-2022

Year	AIM Grads	A&Ps	A&P Rate	Total A&Ps Certified	A&Ps Certified from All Schools	Percentage from AIM
2014	1,034	358	35%	7,216	4,210	9%
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2016	1,215	495	41%	5,856	3,689	13%
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2018	1,188	715	60%	6,706	4,184	17%
2019	1,450	983	68%	7,360	4,720	21%
2020	1,487	615	41%	5,205	3,380	18%
2021	1,528	813	53%	6,929	4,671	17%
2022	1,546	1,231	80%	7,119	4,753	26%

70% of Graduates Become Certified

25% of All A&Ps from Schools come from AIM

2. Community Service

- 2016: Require all schools to include community service activities including all faculty and staff.
- 2018: Include students in community service projects.
- 2021: Require all students to engage in community service projects as part of their educational program.
- 2024: Enacting paid community service time off (20 hours per year) for all employees.



Service Learning & Community Outreach













3. Faculty Engagement and Employee Morale

- Instituted an employee survey as a KPI.
- Slowly add to benefits each year.
- Company-paid tuition.
- Executive leadership program.
- Created an employee progression plan for all employees.

Level 1: Paraprofessional Positions

Receptionist, Library Assistant, Intern, Tool Room Clerk, Administrative Assistant, Hangar Coordinator, Assembly Technician, Campus Maintenance, Test Proctor.

Level 2: Professional Faculty and Staff

Admissions Representative, Admissions Coordinator, Community Outreach Representative, Financial Aid Officer, Bursar, Registrar, Student Services Coordinator, Career Services Coordinator, Technology Assistant, Veterans Affairs Representative, Librarian, Campus Training & Development Specialist, Instructor.

Level 3: Senior Faculty and Staff

Senior Admissions Representative, Senior Financial Aid Officer, Senior Bursar, Senior Registrar, Senior Student Services Coordinator, Senior Career Services Coordinator, Senior Technology Assistant, Assistant Program Coordinator, Senior Instructor, and Lead Instructor.

Level 4: Master Faculty and Staff

Master Admissions Representative, Master Financial Aid Officer, Master Bursar, Master Registrar, Master Student Services Coordinator, Master Career Services Coordinator, Master Technology Assistant, Master Instructor.

Level 5: Entry-Level Management

Program Coordinator, Assistant Director of Admissions, Evening Education Coordinator, Shift Coordinator.

Level 6: Department Management

Director of Admissions, Director of Education, Director of Career Services, Director of Student Affairs, Director of Compliance and Administration.

Level 7: Senior Management

Assistant Campus Director, Senior Director of Admissions, Senior Director of Education.



Seven Strategic Goals



1. Reputation and Record



2. Community Outreach



3. Faculty Engagement and Staff Morale



4. Enrollments



5. Program Development



6. Online Learning and Classroom Innovation



7. Campus Expansion

Financial History, 2014-2023

Earnings before Interest, Taxes, Depreciation, and Amortization







CCHE





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Pennsylvania → Texas → Virginia → Washington DC
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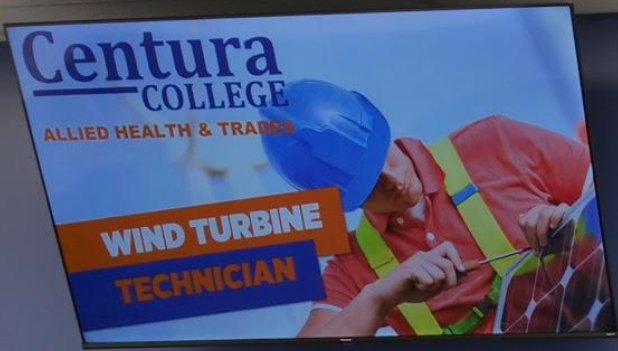
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Senator Mark Warner

Mayor Kenneth Alexander

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Dr Kenny Alexander
Chancellor, Centura College
Mayor, Norfolk, Virginia



UNITED
Technical Operations







Seven Strategic Goals



1. Reputation and Record



2. Community Outreach



3. Faculty Engagement and Staff Morale



4. Enrollments



5. Program Development



6. Online Learning and Classroom Innovation



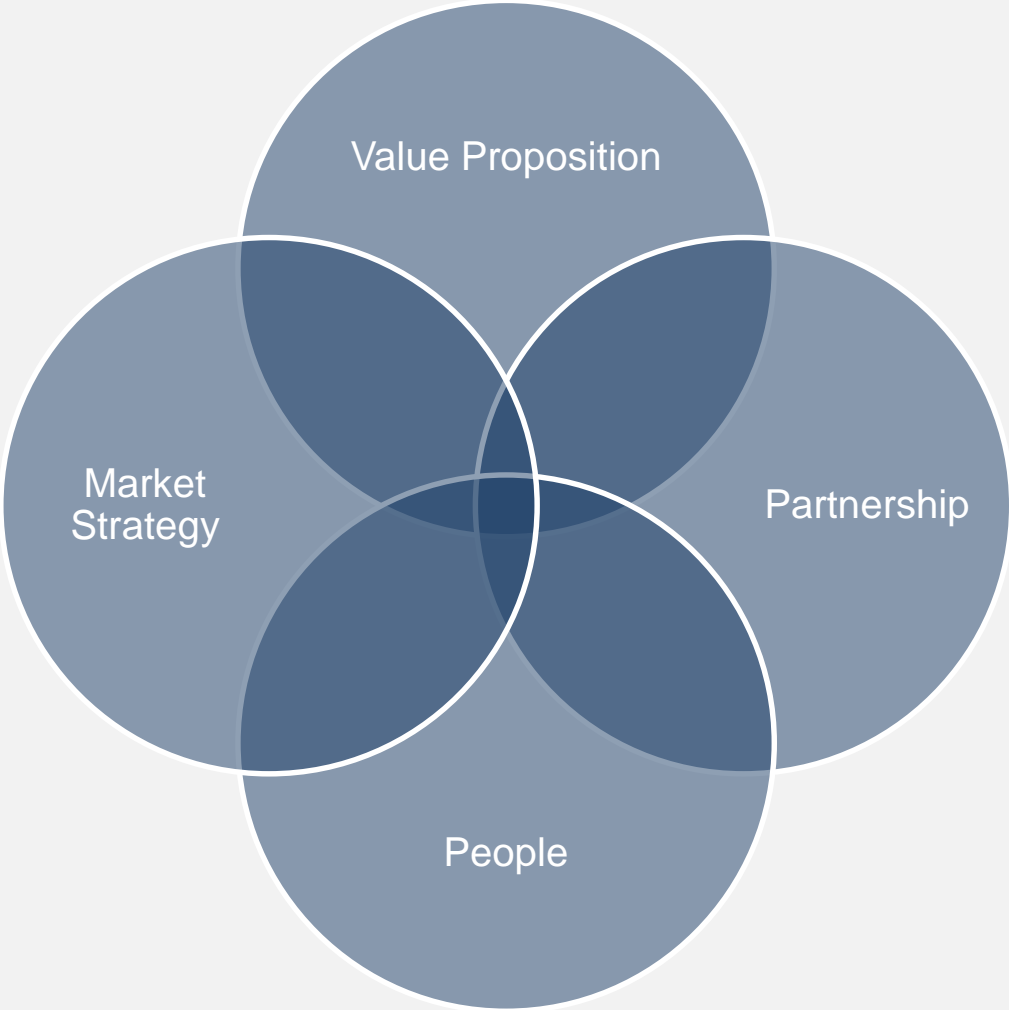
7. Campus Expansion

From the Case Study to the Sector: How This Can Work for You

Politics | Growth | Operations | Economics

The Centura/AIM/TT Story

The institutions are supported and insulated by broadly shared interests.



What Most Schools Need to Do Now

- Rethink your market: It's post-secondary, not higher ed
- Create market driven product strategy
- Sell workforce development rather than individual enrollments
- Reinvent relationship with industry
- Build non-TIV revenue streams
- Dump “one and done” for long-term customer relationships
- Explore last two student markets
 - 39 million with credits and no credential (InsideTrack effort)
 - Traditionally underserved students
- Deliver compelling value proposition

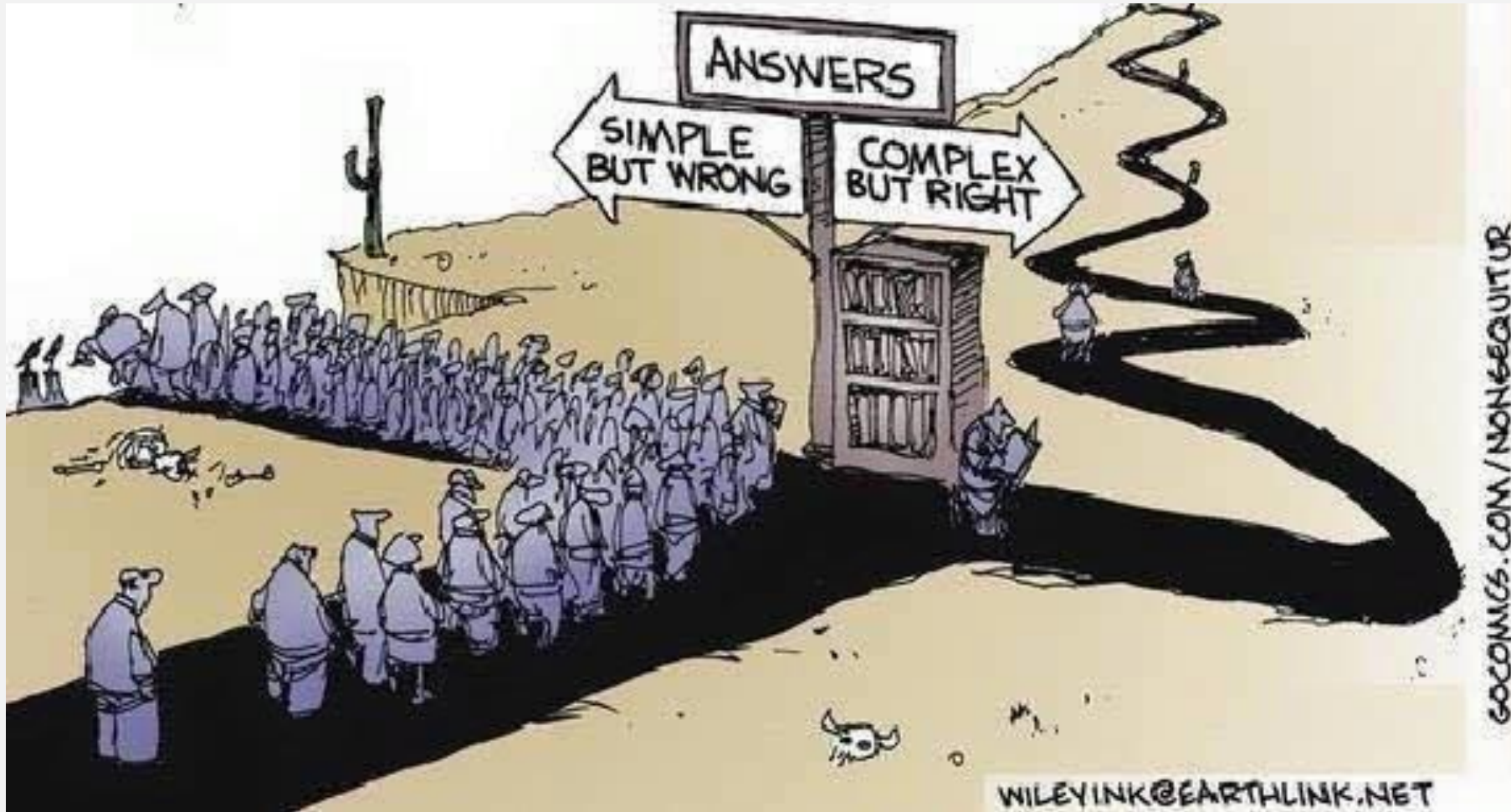


Improvements As Perceived by Students

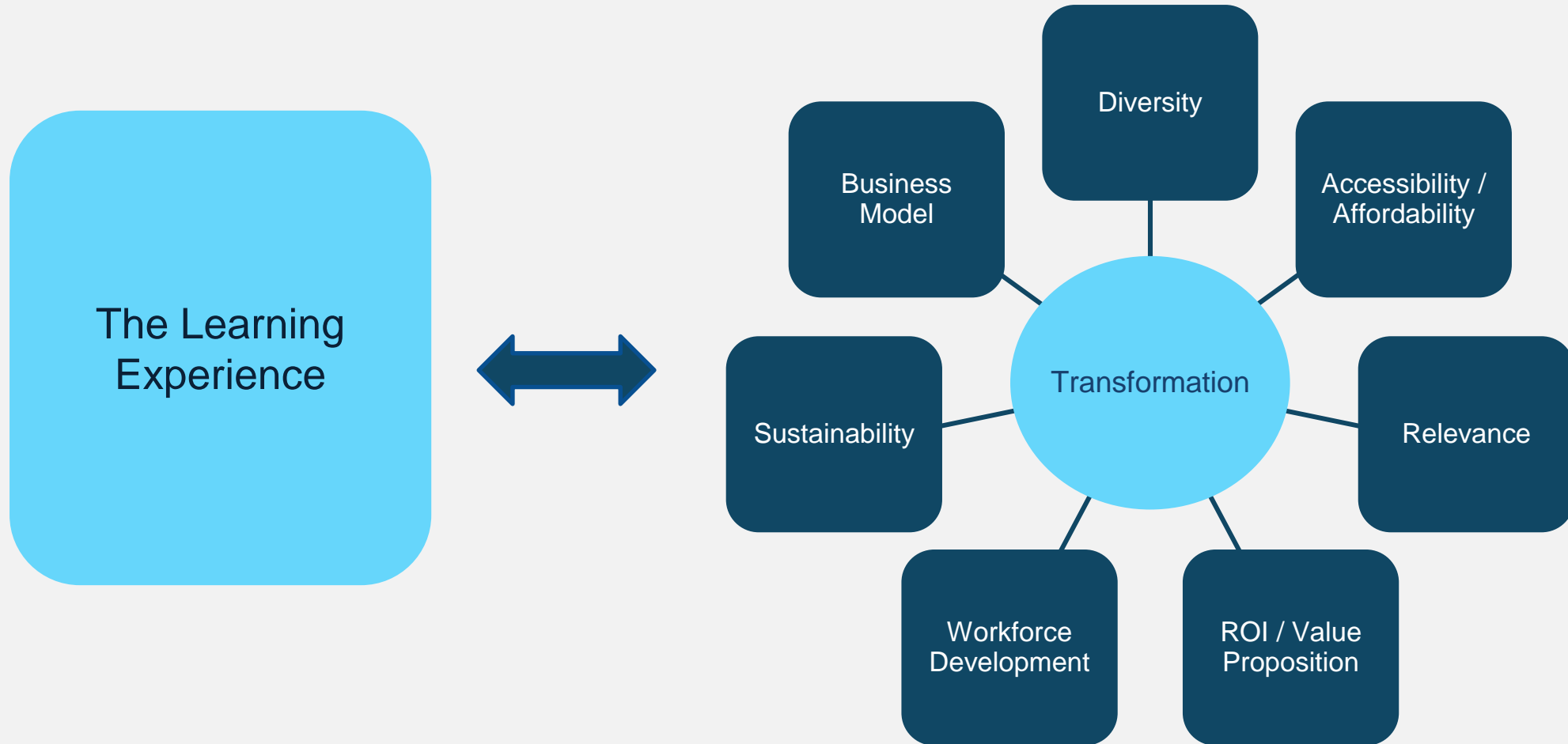
- Combined academic degrees and industry credentials
- Short, highly focused skills-based programs
- Much more affordable programs
- Subscription or subsidized models for “tuition”
- Industry delivered programs that will bypass higher education altogether
- Easy in and out (low friction experience overall)
- Virtual reality learning experiences
- Much less reliance on loans of any kind

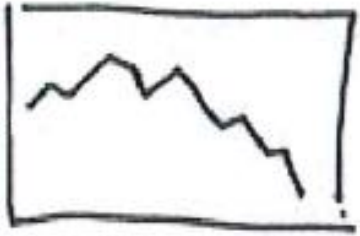


The Role of Leadership



Foundational Issues to Be Solved





Let's plan for
good luck.



Managing the current crisis is essential to surviving, but *purposeful* transformation is required to thrive in the next normal.

Summary

- Higher education has struggled before, but never faced all of the simultaneous external threats that exist today.
- The opportunity lies in post-secondary education.
- Career Education has much in its legacy to build on, but it can't be the way we've always done it.
- For most institutions, to thrive, and in some cases to even survive, they must engage in transformative change.
- The traditional channels of support for higher education are themselves broadly incapable of supporting transformation, which is where the *Transformation Collaborative*TM comes in.



Transformation
Collaborative

www.TransformationCollaborative.net

Game Changing Insights
Trends and Research

Contact Information



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Collaborative



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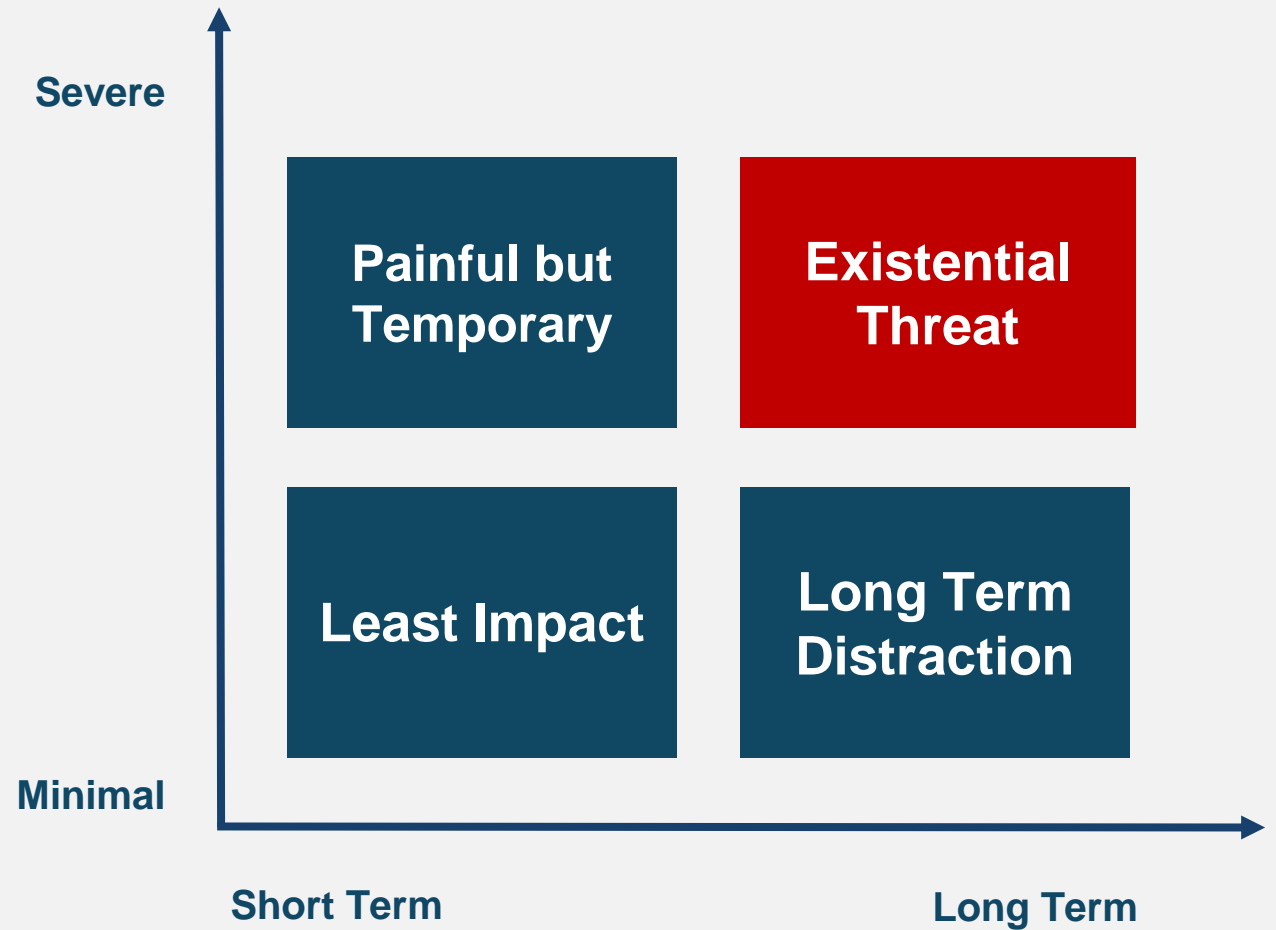


The Story in Data

The Market | Public Opinion | Consumer Behavior | Economics

The Current Crisis (It Started 13 Years Ago)

The current crisis is long-term, severe, existential, and we will not return to the previous normal when it's "over."



The 13-Year Contraction in Higher Education

- Demographics (Declining Birthrates)
- Economy
- Economics (Cost of Education and Debt)
- Negative Societal Opinions about Higher Education
- Shift Away from Degrees Required for Employment
- **Alternatives to College Programs**
- ***COVID-19 Pandemic***
 - Declines in Female and Minority Enrollment
 - Increase in Attrition
 - Increase in Family Financial Stress

The 2018-2019 and 2019-2020 and 2020-2021 year over year enrollment declines were the largest of the entire decade-long contraction. 2021 to 2022 includes an additional decline of more than 600,000 students.

The Reality of COVID-19

The COVID-19 crisis has been a powerful accelerant of existing trends:

- Higher education as a retail business
- Remote delivery of services and instruction
- Shorter, non-degree programs (CBE, certificates)
- Centralized decision making
- Reduced, long-term public funding
- Move away from the traditional calendar
- Rich get richer; poor get poorer
- Only three states saw an enrollment increase in Fall 2021

The only higher ed sector where enrollment is up is four-year, for-profit institutions.

Key Data Points

- Steepest birthrate declines in American history over last three years.
- 4 million fewer students since 2010.
- 1.4 million/10% fewer students since 2019.
- 625,000 fewer students since 2021.
- 3 million students leave college each year because of a time-sensitive financial crisis of \$500 or less.
- Dropouts are up 8.6% since 2019.
- There has been a dramatic decline in percentage of high school grads intending to attend 4-yr college from 71% in 2019 to 48% in 2022.
- 70% of college students now say that affordability has affected their enrollment plans.
- 36% of parents took money from their children's college funds to compensate for pandemic related financial challenges.

Key Data Points

- AWS Educate committed to training \$29 million learners for free.
- Adult learners who earn credit for prior learning are 17% more likely to graduate than those who do not.
- 39 million Americans have college credit but no degree.
- Average student debt is over \$30,000 and 20% of debtholders owe more than \$100,000!
- 82% of graduates of short-term, non-credit programs say it was worth it.
- 70 million adults have skills through alternative routes, but no college credential.
- Over 50% of Americans no longer believe that higher education is good for society.
- 1,500 schools have closed, merged, or been acquired under duress since 2011.
- Virtually all growth in less than 100 of 5,800 Title IV institutions.

Non-Degree Program Research

- 62% of adults would prefer a non-degree program over any degree program.
- 51% of non-degree programs are offered by non-college organizations.
- 42% of workers feel that employers' involvement in their education makes for a better learning experience.
- Alumni outcomes of non-degree programs are higher than associates degrees, but slightly less than bachelor's degrees.
- Labor market outcomes (pay and job satisfaction) are better for non-degree programs than associate degree programs, and the highest value programs are in health sciences.
- Adults who combine any college degree with a non-degree program report the highest quality and value.

Research reported by Strada Education on 7/28/21
<https://cci.stradaeducation.org/wp-content/uploads/sites/2/2021/07/PublicViewpointCharts-072821.pdf>

According to the Department of Labor, the average tenure for American jobs was down to 4.1 years in 2019, but the average life span for work is 60 years. Therefore, a college degree has to provide value for 15 different jobs over six decades!

<https://www.bls.gov/opub/ted/2020/median-tenure-with-current-employer-was-4-point-1-years-in-january-2020.htm>

Strada Education: <https://cci.stradaeducation.org/pv-release-july-28-2021/>

Have and Have Nots

“

Once the federal dollars are gone, the post-pandemic landscape will resemble the pre-pandemic one, with the same pressures, and one of the outcomes from those pressures is continued bifurcation, continued strong getting stronger, weak getting weaker.

”

Emily Wadhvani, Fitch Ratings

What Has Changed

The Market | Public Opinion | Consumer Behavior | Economics

Demographics

- We are in the “trough” of previous declining birthrates.
- Below the “replacement rate” of 2.1 live births since 1971.
- Lowest ever in 2018 and 2019 (1.72), then lower again in 2020!
- Freshmen class cannot grow until at least 2040.
- African American enrollment declined 13% from 2014 to 2019 and minority populations suffered the greatest declines in 2020 and 2021.

“Millions of Americans will be absent first from the classroom and then from the labor market because, to put it bluntly, they were never born.”

The Demographic Drought - Emsi

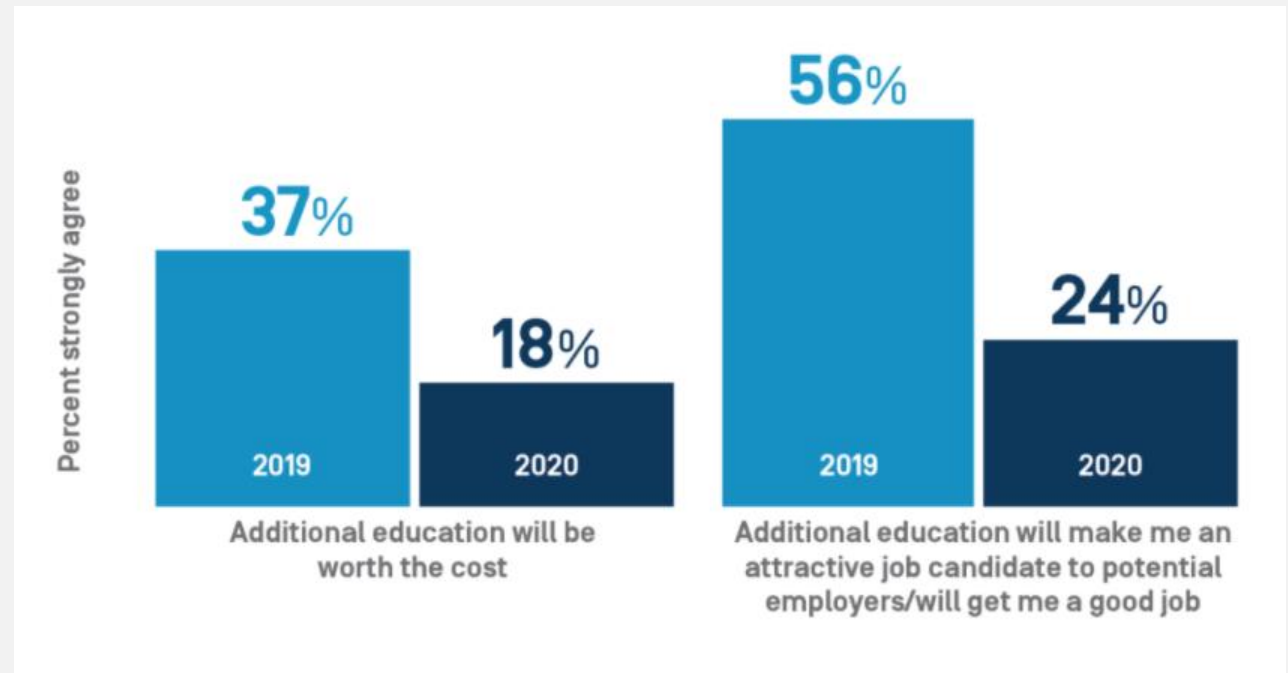
“The rate has generally been below replacement since 1971 and consistently below replacement for the last decade”

- CDC

<https://www.economicmodeling.com/2021/05/04/demographic-drought/>
<https://cci.stradaeducation.org/pv-release-may-19-2021-back-to-class/>

Negative Societal Opinions about Higher Ed

- Gallup Survey (declining confidence)
- Pew Survey (headed in wrong direction)
- Harvard Survey (student debt is a major problem, source of enrollment decision)*
- Strada Survey (return on investment)



* Millennials under 30

<https://cci.stradaeducation.org/pv-release-december-20-2020-insights-from-2020-implications-for-2021/>

The Economy

- Historically Inequitable Distribution of Wealth
- Highest Unemployment Since the Great Depression
- Hollow Recovery from 2008 Recession
 - 57,000,000 moved into gig economy
 - 80% of re-employed made less than before the recession
 - Millions moved from home-owners to renters
- Highest Level of Economic Vulnerability in Modern Times (even BEFORE the pandemic)
- 5,000,000 fewer workers in Fall 2021 than Fall 2019
- Over 50% of Americans in 2023 report that their financial situation is “precarious.”

<https://www.washingtonpost.com/news/wonk/wp/2018/05/25/the-alarming-statistics-that-show-the-u-s-economy-isnt-as-good-as-it-seems/>
<https://wallacekpond.com/2019/10/06/struggling-through-good-times-why-were-so-stressed-despite-a-strong-economy/>

Economics of Higher Education

- Tuition has increased 40% in the last ten years.
- Since 1989, tuition has doubled, after inflation (eight times faster than increases in wages).
- Total student debt is now \$1.75 trillion (exceeding both credit card and auto loan debt).
- Average student debt is now over \$32,000 per person and roughly 20% of students owe more than \$100,000 dollars.
- Half of all borrowers were making interest-only payments before the pandemic.
- The combination of time and money required for a traditional degree program is becoming untenable for many post-secondary students.
- We may see massive default rates when Covid-based loan deferrals expire.

- The cost of education has exceeded customer elasticity.
- Many students now feel that the ROI is either not positive enough or is actually negative.

Financial State of Higher Ed

- Roughly 1,360 colleges and universities have seen declines in first-year fall enrollment since 2009, including about 800 four-year institutions.
- Nearly 30% of all four-year schools brought in less tuition revenue per student in 2017-18 than in 2009-10.
- About 700 public campuses received less in state and local appropriations in 2017-18 than in 2009-10, and about 190 private four-year institutions saw the size of their endowments fall relative to their costs.
- 30% of all colleges were operating in the red before COVID-19.
- 650,000 higher ed employees were laid off in 2020.

Approximately 1,700 IHEs were operating with less revenue than expense in 2019, and many of those had been in a deficit scenario for years prior to that.

As HEERF funding ends, so will the temporary reprieve.

<https://www.highereddive.com/news/moodys-lowers-higher-ed-outlook-to-negative-amid-coronavirus-crisis/574414/>
<https://hechingerreport.org/analysis-hundreds-of-colleges-and-universities-show-financial-warning-signs/>
<https://www.fitchratings.com/research/us-public-finance/inflation-federal-policy-to-weight-on-us-colleges-18-11-2021>

In the Past, We Were Bailed Out By:

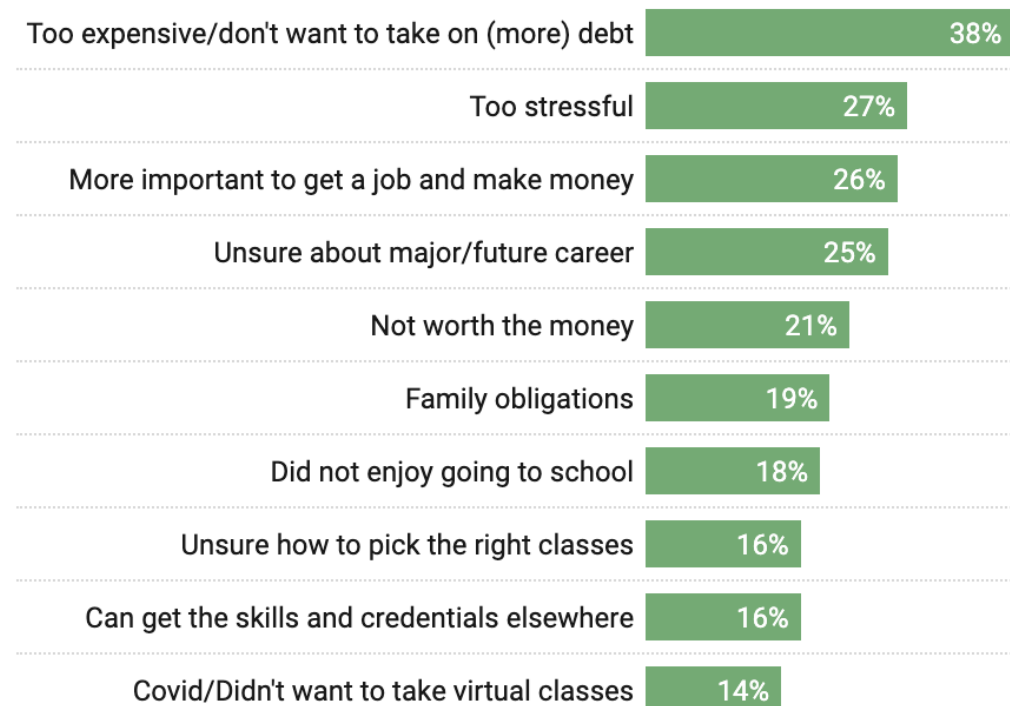
- GI Bill
- Vietnam War
- Community Colleges
- Pell Grant
- Women Entering Higher Ed
- Online
- International
- Military

All of these have been tapped out. CARES Act was temporary.

2022 Survey of 2021 High School Grads Who Did Not Enroll in Any Institution of Higher Ed

Key Barriers to College

Cost is the main reason high-school graduates say they didn't attend or complete college. Stress and the desire to join the work force are other commonly cited reasons.



Note: Data reflect a spring 2022 survey of 1,675 high-school graduates, ages 18 to 30, who didn't go to a two- or four-year college or dropped out.

Chart: Audrey Williams June • Source: [Edge Research](#), [HCM Strategists](#), [Bill & Melinda Gates Foundation](#) • [Get the data](#) • Created with [Datawrapper](#)

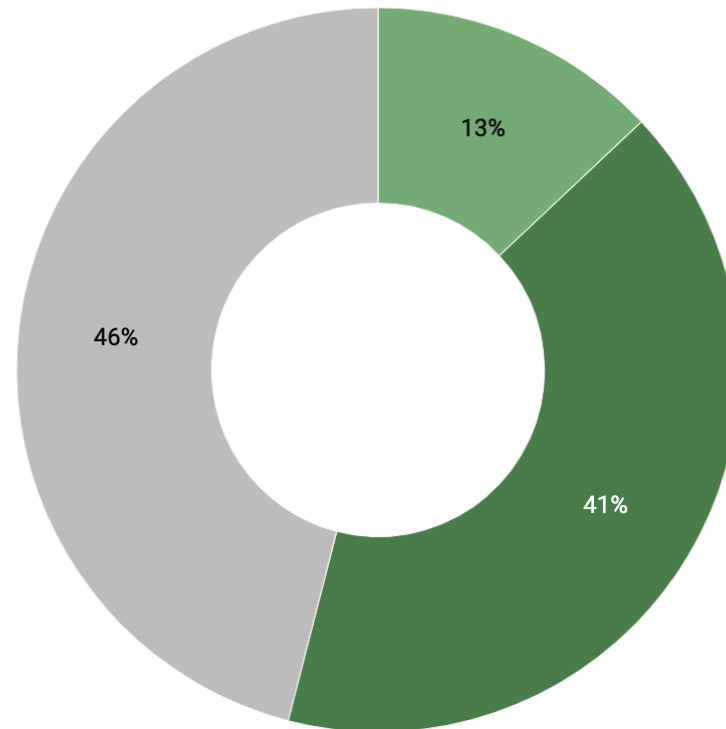
2022 Survey of 2021 High School Grads Who Did Not Enroll in Any Institution of Higher Ed

College Not in the Plan

More than half of young adults who never attended college or dropped out of it either are not sure that it's part of their future or don't plan to attend or return at all.

Future plans regarding college

■ Don't plan on going/returning to college ■ Unsure ■ Definitely plan on going/returning to college



Note: Data reflect a spring 2022 survey of 1,675 high-school graduates, ages 18 to 30, who didn't go to a two- or four-year college or dropped out.

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Alternatives to College

Growing move away from college degrees

Short Courses

- Industry badges & certifications
- Boot camps

On the Job Training

- Ab-initio training
- Apprenticeships



Netflix bootcamp in partnership with Norfolk State University & 2U



Google certificate training in several areas made available to the public, blowing up both the degree and tuition models at the same time



Amazon training programs

Take as many courses as you would like with our \$99 monthly subscription fee. Our average student finishes a course in 33 days.

United States History I

3 Credits

Starting at

\$59



Introduction to Sociology

3 Credits

Starting at

\$59



College Algebra

3 Credits

Starting at

\$59



Western Civilization I

3 Credits

Starting at

\$59



Straighterline

45,000 Students in 2021