BARTOnline Out of state students

1. Environment Conditions
    a. Barton's online enrollment gains are decreasing
    b. Competition from Johnson, Butler, Colby, Garden City and Seward is increasing
    c. In 2013, the Midwest generated 22% of the nation's high school grads, that share is projected to decrease to 19% by 2030
    d. Nationally college enrollments are declining
    e. Nationally college funding is dropping
2. Assumptions
    a. Barton has a good chance of attracting out of state students because of pricing
    b. Kansas online student market will become more competitive
    c. Because of loss of state funding and college age population growth, southern states will be a good target
    d. Online class growth will continue to increase nationwide.
    e. States/cities with Free college tuition will not affect our efforts to grow online
3. Facts
    a. Johnson online growth rate is currently 20% per year (16,000 credit hours)
    b. Butler online growth rate is currently 6% (11,000 credit hours)
    c. Colby online growth rate is currently 67% (2300 credit hours)
    d. Garden online growth rate is currently 14% (450 credit hours)
    e. Barton County online growth rate is 8% (13,000 credit hours)
    f. Online e-learning in the U.S. will grow 47% over the next 5 years
    g. Barton's 20-44 year olds make up 81% of enrollments
    h. Texas HS graduates are projected to increase 15% by 2025, state funding dropping 23%, unemployment rate 4.9%
    i. Georgia HS graduates are projected to increase 8% by 2025, state funding is dropping 22%, unemployment rate 5.3%
    j. Florida HS graduates are projected to increase 11% by 2025, state funding is dropping 25%, unemployment rate 5.0%
    k. Arizona HS graduates are projected to increase 8% by 2025, state funding is dropping 47%, unemployment rate 5.1%
    l. Louisiana HS graduates are projected to increase 5% by 2025, state funding is dropping 42%, unemployment rate 5.8%
    m. New Mexico HS graduates are projected to increase 5% by 2025, state funding is dropping 32%, unemployment rate 6.8%
4. Goals (Brandon and Claudia)
    a. Target Texas and potentially Florida to increase marketing efforts
    b. Increase awareness of BARTonline associate degree offerings over a two-year period in Texas, expanding to other states (Florida) and beyond (Southeast Asia) if budget allows.
5. Plan (Brandon and Claudia)
    a. Direct advertising agency to place paid search engine and social media advertising targeted to potential students aged 18-22 years in key regions.
    b. After six months, assess costs to look at the possibility of expanding marketing to Florida and overseas, or consider enhancing marketing to Texas depending on response.
6. Thought process (Brandon and Claudia)
    a. Continually monitor and adjust messaging and placement based on response to ensure we are reaching those most likely to engage and enroll.

Size of e-Learning market US (in million dollars)

	2014	2022	% Change
United States	165.36	243.8	47%

Size of e-Learning market by region (in million dollars)

	2013	2016	% Change
North America	23,800	27,100	14%
Western Europe	6,800	8,100	19%
Asia	7,100	11,500	62%

Projected High School Graduates (Knocking at the College Door)

State - Public	2016	2019	2022	2025	% Growth Change	State Funding Drop since 2008
Kansas	32,000	33,000	34000	36000	13%	21%
Arizona	65000	67000	67000	70000	8%	47%
Florida	160000	166000	164000	177000	11%	25%
Georgia	97000	101000	99000	105000	8%	22%
Louisiana	39000	40000	38000	41000	5%	42%
Mississippi	25000	26000	25000	27000	8%	23%
New Mexico	19000	20000	20000	20000	5%	32%
Texas	316000	337000	343000	363000	15%	23%

FAFSAs submitted by application cycle

State	2013-2014	2014-2015	2015-2016	2016-2017	
Kansas	73016	71146	68654	64846	-11%
Arizona	136777	136782	137041	133757	-2%
Florida	483622	473505	464607	434177	-10%
Georgia	240338	231981	231588	211206	-12%
Louisiana	75103	76203	75817	72500	-3%
Mississippi	64921	65039	61976	58695	-10%
New Mexico	47191	47180	44789	41651	-12%
Texas	578292	588080	587987	593006	3%

Colleges 2 year distance growth rate 14-16 KBOR

Barton	7.72
Butler	6.45
Cloud	17.5
Colby	67.49
Garden City	14.42
Hutchinson	-5.42
Johnson	20.48
Seward	14.06

Unemployment Rates

	2017
Kansas	4.0%
Arizona	5.1%
Florida	5.0%
Georgia	5.3%
Louisiana	5.8%
Mississippi	5.2%
New Mexico	6.8%
Texas	4.9%

KBOR enrollment by age AY 2016

College	<18	18-19	20-24	25-44	45-64	65+
Barton	3.6%	10.1%	44.8%	37.0%	4.3%	0.3%
Butler	5.1%	22.6%	39.7%	28.1%	4.4%	0.2%
Cloud	19.3%	27.4%	26.4%	18.9%	6.4%	1.6%
Colby	10.6%	29.0%	37.4%	17.6%	4.1%	1.4%
Garden City	6.5%	28.4%	38.0%	19.8%	6.7%	0.6%
Hutchinson	14.1%	25.9%	29.8%	23.6%	6.2%	0.3%
Johnson	11.0%	20.3%	34.7%	26.8%	5.7%	1.5%
Seward	17.2%	27.5%	26.0%	17.5%	8.3%	3.6%

College (IPEDS data)	Students	Student Faculty ratio	Net Price	Not enrolled in distance courses	Retention Rate Full-time	Retention Rate Part-time	Graduation Rate	Default Rate	Online In State Tuition	Third Attempt
Barton Community College	4815	23 to 1	$ 9,857.00	61%	53%	27%	29%	15.70%	$ 150.00	Page 2
Florida										
Hillsborough Community College	26,571	22 to 1	$ 5,400.00	72%	61%	49%	30%	16.50%	$ 104.39	
Pasco-Hernando Community College	11,387	27 to 1	$ 5,593.00	58%	??%	??%	33%	20.30%	$ 118.18	
Tallahassee Community College	12,445	30 to 1	$ 4,307.00	72%	58%	42%	35%	23.50%	$ 100.83	
Texas										
Houston Community College	56,522	24 to 1	$ 6,712.00	66%	62%	45%	13%	20.30%	$ 171.50	
Austin Community College	41,574	21 to 1	$ 7,210.00	76%	56%	48%	8%	18.10%	$ 363.00	
El Paso Community College	28,764	26 to 1	$ 3,476.00	78%	64%	50%	13%	13.80%	$ 114.00	

Texas legislation allows state colleges and universities to charge additional tuition and/or fees for students who enter a Texas public higher education institution beginning in fall 1999 and who exceed by 1.5 times the number of credit hours required for the degree.

Texas legislation allows state colleges and universities to charge additional tuition and/or fees for students who exceed 27 credit hours in developmental courses.

Texas legislation disallows state funding for any course for which a student enrolls more than two times, regardless of grade received. ACC charges a Third Attempt Fee for the following: • Courses with the same or substantially similar content. • Courses that have been attempted more than twice. • Graded and/or courses dropped after the college census date. (See census date)

As per Florida state statute 1009.285 and Florida Administrative Code 6A-14.0301 a student enrolled in the same undergraduate college-credit course more than twice shall pay tuition at 100 percent of the full cost of instruction. If a student, who is a Florida resident, registers for a course for the third time, he or she must pay the full cost of tuition (out-of-state tuition) for that attempt.

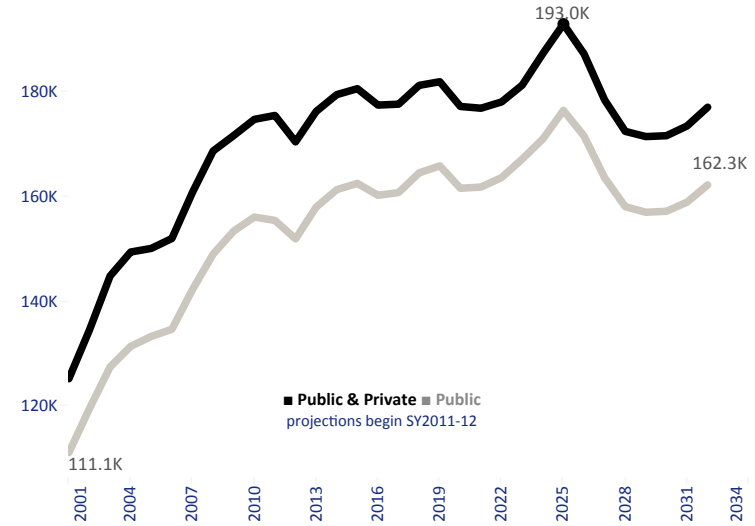
Hillsborough	https://www.hccfl.edu/paying-for-college/tuition-fees.aspx
Pasco	https://phsc.edu/epi/tuition-and-costs
Houston	http://www.|http://www.hccs.edu/district/about-us/catalog/costrefund-information/
Austin	http://www.austincc.edu/tuition-and-financial-aid/tuition-and-fees
El Paso	https://www.epcc.edu/TuitionsandFees/Pages/ResidentFees.aspx

State Profile for Florida

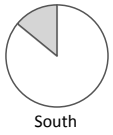
Florida

KNOCKING AT THE COLLEGE DOOR

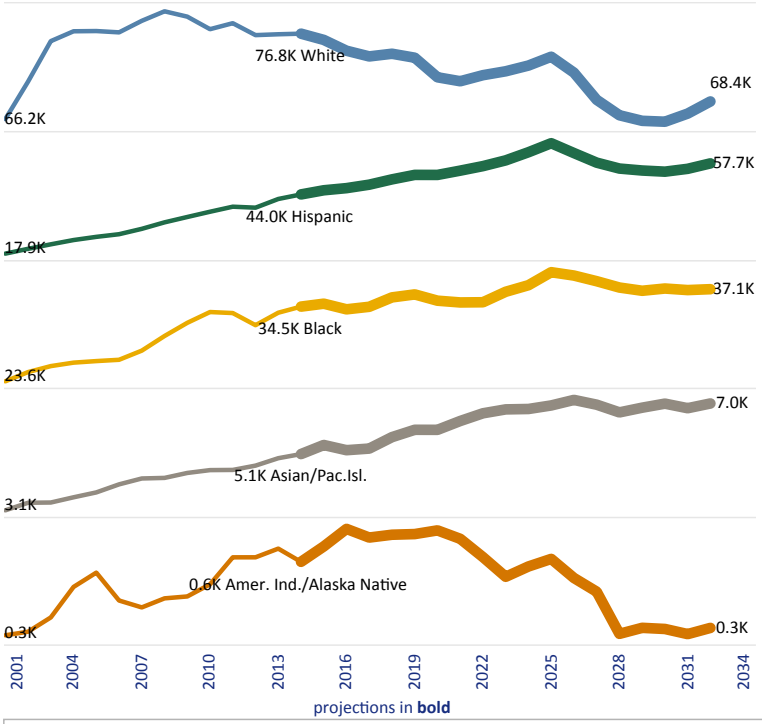
Overall High School Graduate Trends



- 4th highest producer of high school graduates with 178,700 high school graduates, on average, projected per year between school years 2011-12 and 2031-32.
- The total number of graduates is projected to increase by 13.2% between 2011-12 and 2024-25, the next highest year for Florida.
- Florida generates about 14.0% of the South's total, on average



Public School Trends



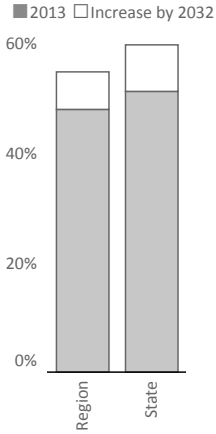
projections in **bold**

White Graduates

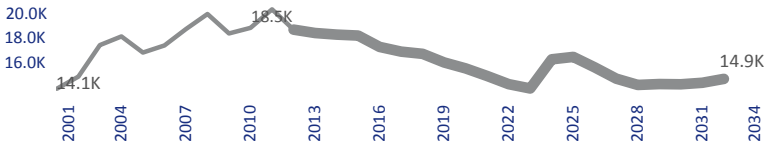
- White graduates will change from 49% to 40% of public school graduates, around 8,300 fewer in 2031-32 than 2012-13.

Non-White Graduates

- Florida high school graduates are more diverse than the South overall.
- Non-White graduates in Florida will increase in number by around 20,800 from 2012-13 to 2031-32, and change from 51% to 60% of public high school graduates.



Private School Trends



- Private school graduates from Florida are projected to decrease 18% by 2031-32, around 3,700 fewer graduates in 2031-32 than in 2010-11 (the last confirmed year).
- Private school graduates were 11.4% of Florida's total graduates in 2010-11, and are projected to be 8.4% of the total by 2031-32.

Notes: School Year refers to the K-12 calendar running fall to spring and may include graduates from any point in that school year, including the summer after the year end. The Grand Total is the sum of the Nonpublic Schools and Public Schools totals. The Private Schools Total includes schools not supported primarily by public funds, religious and nonsectarian, but not including homeschool students. Private Schools projections begin in school year 2011-12. The Public Schools Total will not exactly equal the sum of the races/ethnicities columns, which are projected separately. Prior to 2010-11, data were not available separately for Asian and Pacific Islander students, and Two or More Races students. Hawai'ian/Pacific Islander and Two or More Races counts are displayed separately in the years they were reported for informational purposes, but are included in the race categories in the projected years. For more detailed information, see the Technical Report at http://knocking.wiche.edu/.

Source: Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates, 2016.

Few demographic indicators are available that relate precisely to the Knocking at the College Door projections, and each data source has limitations. But, several indicators of Florida's key populations in recent years are presented below, to help users evaluate the implications of the projections.

Academic Preparation and Achievement

National Assessment of Educational Progress (NAEP), 2015

Above Average ■■ ■■ Below Average

Score	All 8th Graders (Average)	White	Asian / Pac.Isl.	Black	Hispanic
Composite	269	10	21	-14	-3
Math	275	10	22	-17	-3
Reading	263	9	20	-12	-3

Source: U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics (NCES), *National Assessment of Educational Progress (NAEP), 2015 Mathematics and Reading Assessments,* 8th graders tested in 2015, scale of 0 to 500. NAEP Data Explorer, http://nces.ed.gov/nationsreportcard/naepdata/. WICHE calculations of simple average composite scores.

Four-Year Graduation Rate

Above Average ■■ ■■ Below Average

School Year	Overall	White	Asian / Pac.Isl.	Black	Hispanic	Amer. Ind. / Alaska Native
2012 - 13	76%	5%	13%	-11%	-1%	1%
2013 - 14	76%	6%	13%	-11%	-1%	-2%
2014 - 15	78%	5%	13%	-10%	-1%	-2%

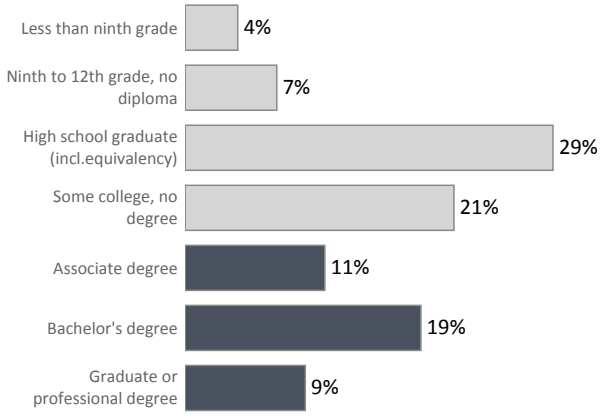
Source: U.S. Department of Education, NCES, *EDFacts,* Adjusted Cohort Graduation Rate (ACGR), *https://www2.ed.gov/about/inits/ed/edfacts/index.html* . Two or more races students are in the Overall rate but not in any race or ethnicity group.

Funding per Pupil, Public Schools

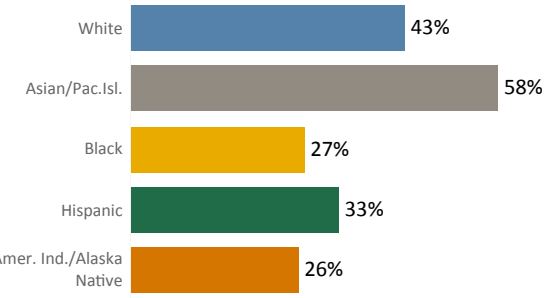
FY 2013: $8,623 FY 2014: $8,714

Source: U.S. Department of Education, NCES, *Revenues and Expenditures for Public Elementary and Secondary Education,* FY2013, NCES 2015-301, Table 4, http://nces.ed.gov/pubs2015/2015301.pdf and FY2014, NCES 2016-303, Table 2, https://nces.ed.gov/pubs2016/2016303.pdf . Current dollars. Figures include pre-K and kindergarten.

Educational Attainment, Adults 25-64 y.o., 2014

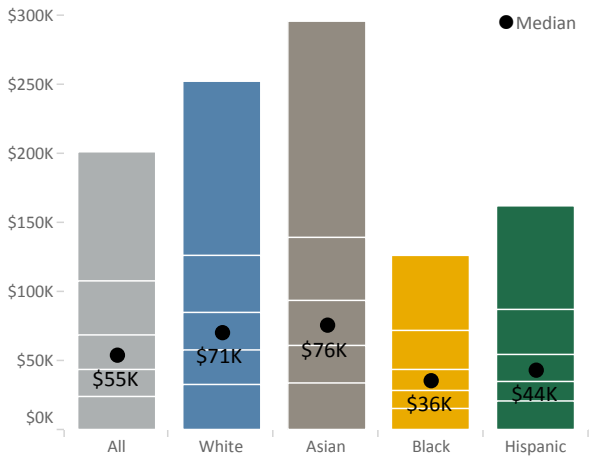


Associate's Degree or Above



Source Lumina Foundation, *Stronger Nation*, 2016, https://www.luminafoundation.org/. Average annual percent of population ages 25-64 by education level, or Associate's degree or higher, in 2012-14.

Income, Households with Children 0-17 y.o., 2014



WICHE calculations from U.S. Census Bureau, 2010-14 American Community Survey (ACS) Public Use Microdata Sample (PUMS) File. Average annual household income for households with children ages 0-17, by race/ethnicity of responding householder. Each bar segment indicates income limits for 20 percent of the population (quintiles) for 0 to 95th percentiles. Estimates not shown if coefficients of variation are over 25 percent or sample size is less than 50.

Average Tuition & Fees, 2016-17

4-Year College: $6,356

2-Year College: $3,242

Source: The College Board, *Trends in College Pricing 2016*, Table 5 Average Published Tuition and Fees by State, from https://trends.collegeboard.org/college-pricing. 2016 dollars.

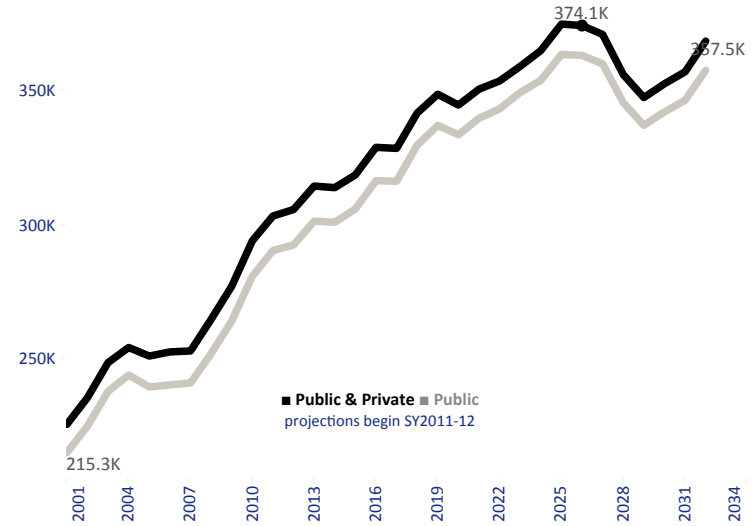
Note: Data for American Indian/Alaska Native and Two or More Races categories are not charted here due to frequent limitations with reliability in the estimate. Estimates for some other small populations are also not presented for that reason. Data and source information for these estimates are available in the datasets at http://knocking.wiche.edu/data.

State Profile for Texas

Texas

KNOCKING AT THE COLLEGE DOOR

Overall High School Graduate Trends

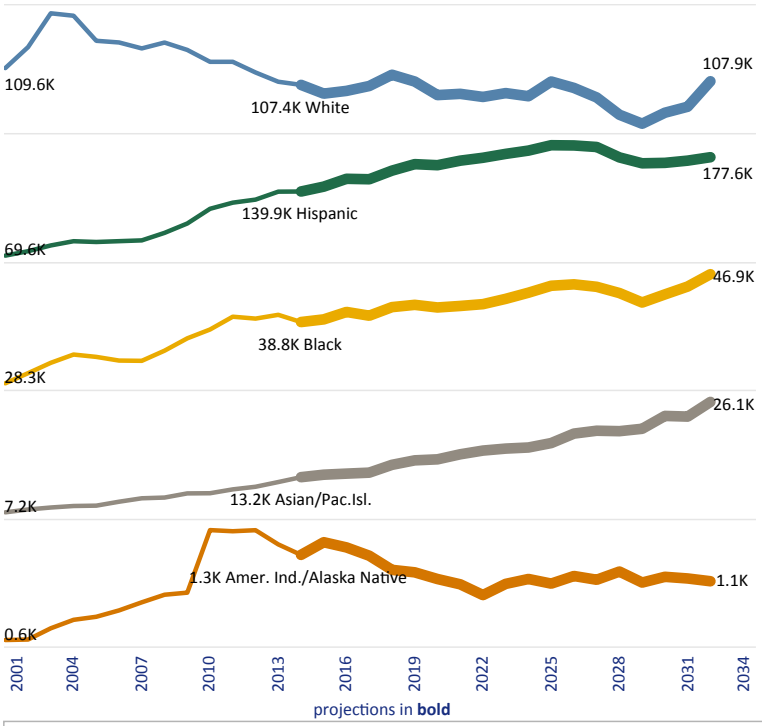


- 2nd highest producer of high school graduates with 346,300 high school graduates, on average, projected per year between school years 2011-12 and 2031-32.

- The total number of graduates is projected to increase by 22.6% between 2011-12 and 2024-25, the next highest year for Texas.

- Texas generates about 27.1% of the South's total, on average

Public School Trends



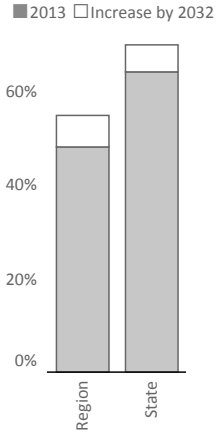
White Graduates

- White graduates will change from 36% to 30% of public school graduates, around 100 more in 2031-32 than 2012-13.

Non-White Graduates

- Texas high school graduates are more diverse than the South overall.

- Non-White graduates in Texas will increase in number by around 58,200 from 2012-13 to 2031-32, and change from 64% to 70% of public high school graduates.



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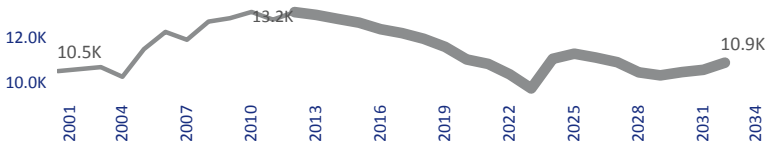

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- Private school graduates were 4.2% of Texas's total graduates in 2010-11, and are projected to be 3.0% of the total by 2031-32.

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Composite	272	14	25	-13	-7
Math	284	14	28	-17	-7
Reading	261	13	22	-10	-9

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Four-Year Graduation Rate

Above Average ■■ ■■ Below Average

School Year	Overall	White	Asian / Pac.Isl.	Black	Hispanic	Amer. Ind. / Alaska Native
2012 - 13	88%	5%	6%	-4%	-3%	-2%
2013 - 14	88%	5%	6%	-4%	-3%	-1%
2014 - 15	89%	4%	6%	-4%	-3%	-3%

Source: U.S. Department of Education, NCES, *EDFacts,* Adjusted Cohort Graduation Rate (ACGR), *https://www2.ed.gov/about/inits/ed/edfacts/index.html* . Two or more races students are in the Overall rate but not in any race or ethnicity group.

Funding per Pupil, Public Schools

FY 2013: $8,261 FY 2014: $8,572

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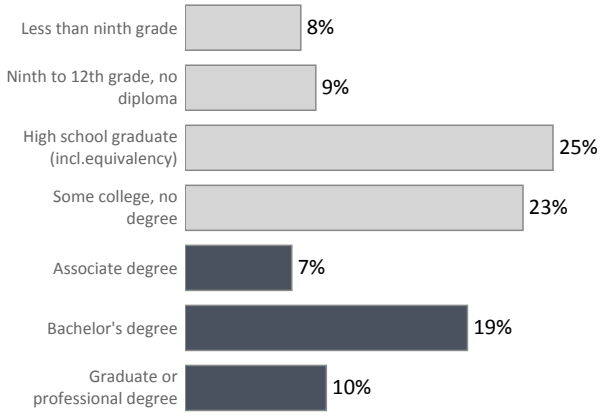
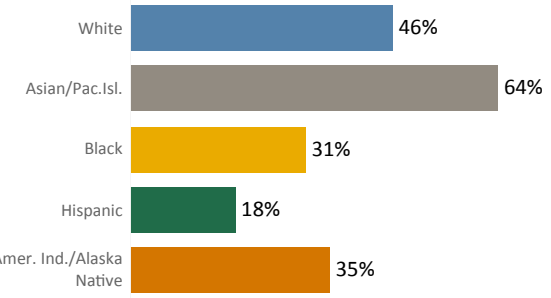


Associate's Degree or Above



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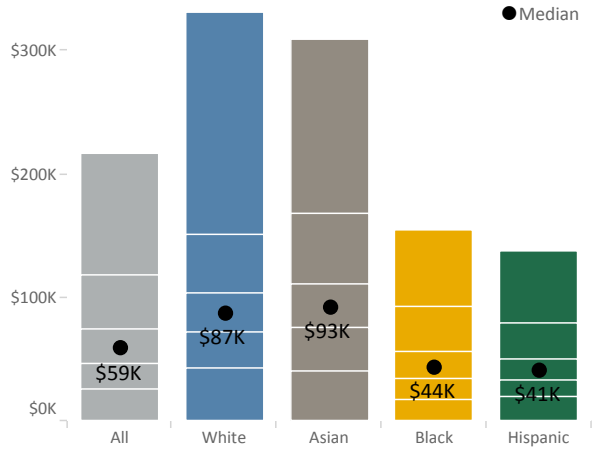

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Average Tuition & Fees, 2016-17

4-Year College: $9,566

2-Year College: $2,409

Source: The College Board, *Trends in College Pricing 2016*, Table 5 Average Published Tuition and Fees by State, from https://trends.collegeboard.org/college-pricing. 2016 dollars.

Note: Data for American Indian/Alaska Native and Two or More Races categories are not charted here due to frequent limitations with reliability in the estimate. Estimates for some other small populations are also not presented for that reason. Data and source information for these estimates are available in the datasets at http://knocking.wiche.edu/data.