## Neither Fish Nor Fowl...

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Why Now?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Un-accredited</td>
<td>Product Equivalence, Especially Online</td>
</tr>
<tr>
<td>Un-bundled</td>
<td>HE Not Meeting Market Needs</td>
</tr>
<tr>
<td>Un-credentialed</td>
<td>Inflexible Regulatory Structure</td>
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<tr>
<td>Un-subsidized</td>
<td>Abundance of Choice</td>
</tr>
<tr>
<td>Un-expensive</td>
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</table>
Can I repay the debt?

Can I get a job?

What am I learning?

Tuition

Student Funding Sources

- Exponentially More Choices
- Focus on Course Transferability

Students are Shoppers!
“Un” Higher Education Market Map

- Udemy
- lynda.com
- Pluralsight
- Coursera
- Skillsoft

- Straighterline
- SOPHIA
- Jump Course
- Smart Degree
- College for America

Direct-to-Consumer Sales

Enterprise Sales

Non-credit or skills-based

Credit
“Thinking Outside the College…”

ONLINE COURSES
• ACE Credit recommended
• 80+ direct college partners
• About $50 per credit hour

PRIOR LEARNING
• Sponsored by CAEL
• $149 course + $125 per course review

HIGH STAKES TESTS
• About $90+ per exam

Average Undergraduate Price Per Course 2013-2014

Private for-profit: $1,123
Private non-profit: $1,143
Public 4 Year: $829
Public 2 Year: $359
StraighterLine: $150
CLEP: $92

Source: EdAssist Corporate Survey and College Board, Trends in College Pricing
• Provides affordable, well-supported, ACE Credit recommended, online general education courses.

• $99 per month + $49 per course started.

• Enrolled 10,000 students last academic year. 15,000 this academic year.

• At WGU, 90% of SL students are still enrolled after twelve months.

• 80+ partner colleges; 500+ “acceptors”
## Opportunity: Marketing Partnerships

<table>
<thead>
<tr>
<th>Provider</th>
<th>Higher Ed Partner Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>MOOCs</td>
<td>Elite Colleges</td>
<td>Brand extension.</td>
</tr>
<tr>
<td>StraighterLine, Learning Counts</td>
<td>Regionally Accredited Colleges</td>
<td>Student Segmentation</td>
</tr>
</tbody>
</table>
Public Policy Questions

- Should these providers receive taxpayer subsidies?
- Should they be regulated?
- If so, how?
Questions?

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