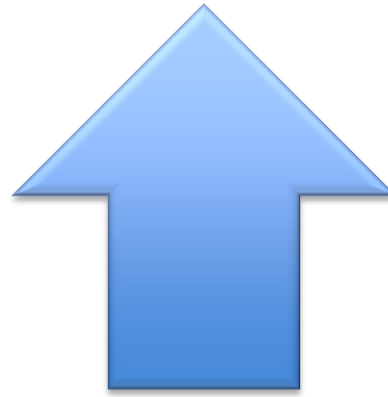


# Neither Fish Nor Fowl...


Characteristics	Why Now?
Un-accredited	Product Equivalence, Especially Online
Un-bundled	HE Not Meeting Market Needs
Un-credentialed	Inflexible Regulatory Structure
Un-subsidized	Abundance of Choice
Un-expensive	



Can I repay the debt?



**Tuition**



What am I learning?

**Student  
Funding  
Sources**

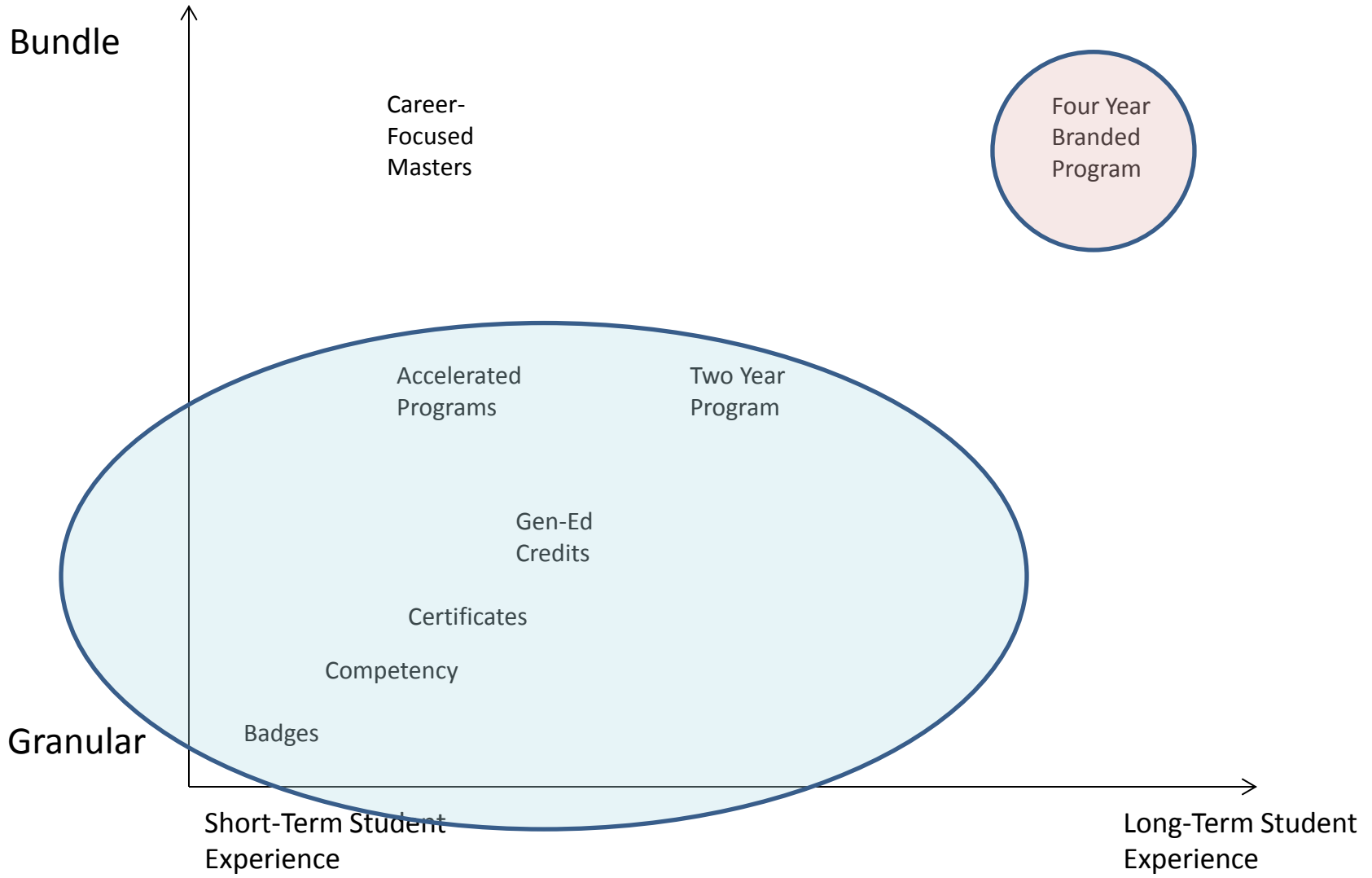


Can I get a job?

- Exponentially More Choices
- Focus on Course Transferability



**Students are Shoppers!**



# “Un” Higher Education Market Map



# “Thinking Outside the College...”



## ONLINE COURSES

- ACE Credit recommended
- 80+ direct college partners
- About \$50 per credit hour

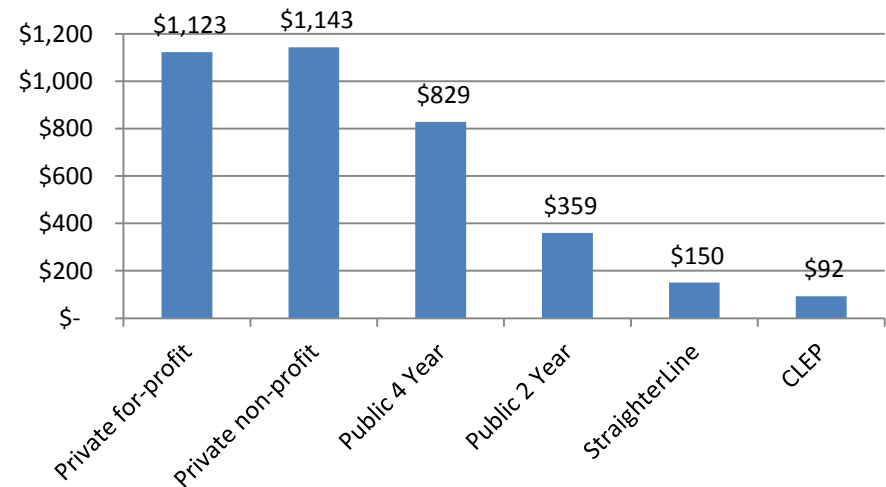
## PRIOR LEARNING

- Sponsored by CAEL
- \$149 course + \$125 per course review

## HIGH STAKES TESTS

- About \$90+ per exam

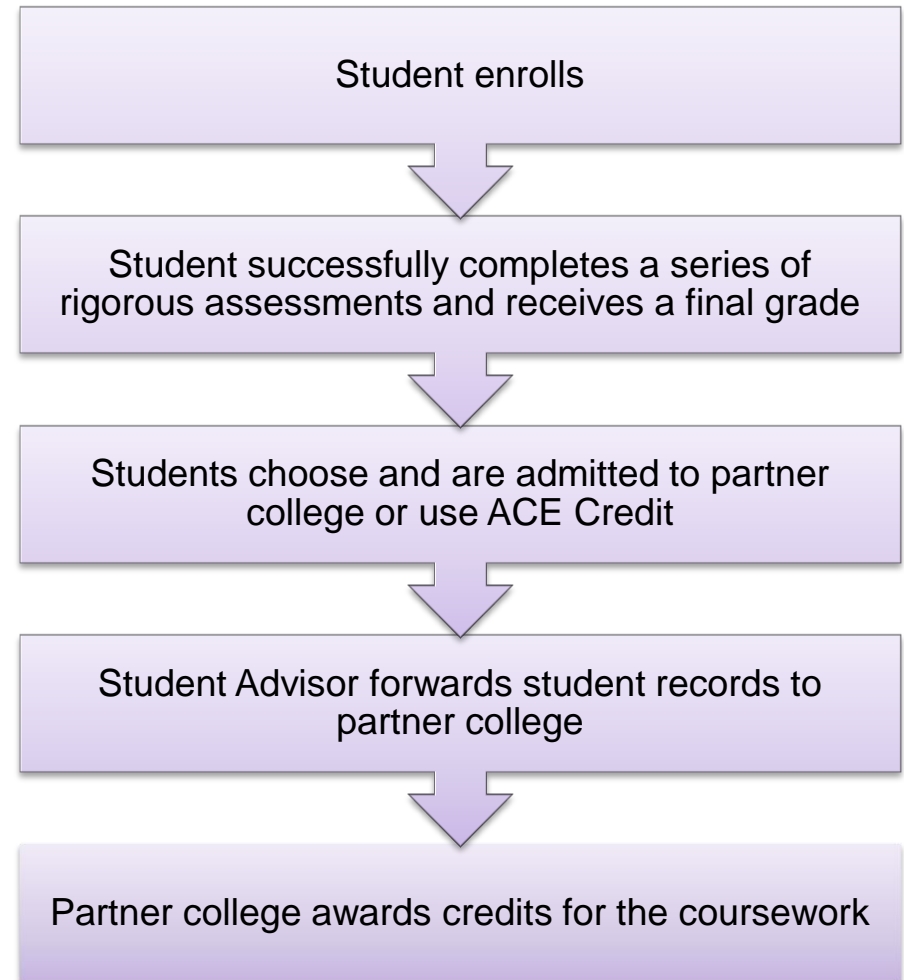
## Average Undergraduate Price Per Course 2013-2014



Source: EdAssist Corporate Survey and College Board, Trends in College Pricing

# StraighterLine

- 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

Provider	Higher Ed Partner Type	Value
MOOCs	Elite Colleges	Brand extension.
StraighterLine, Learning Counts	Regionally Accredited Colleges	Student Segmentation

# Public Policy Questions

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



# Questions?

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