



FACULTY SENATE

APPROVED MINUTES OF DECEMBER 4, 2024

<https://inside.southernct.edu/faculty-senate/meetings>

The 7th Meeting of the Faculty Senate AY 2024-2025 was held on December 4, at 12:11 p.m. via Zoom.

Attendance

FIRST	LAST	DEPARTMENT	TERM ENDS (SPRING)	ATTENDANCE	TOTAL
Lisa	Haylon	Accounting	2025	x	3/7
Valerie	Andrushko	Anthropology	2026		6/7
Jeff	Slomba	Art & Design	2027		7/7
		Athletics	2026		
Nicholas	Edgington	Biology	2026		7/7
Kate	Toskin	Business Information Systems	2025		7/7
Jeff	Webb	Chemistry & Biochemistry	2026		6/7
Shawneen	Buckley	Communication Disorders	2027		7/7
Melanie	Savelli	Communication, Media & Screen Studies	2025	x	4/7
Shafaeat	Hossain	Computer Science	2025	x	6/7
Matthew	Ouimet	Counseling	2027		5/7
Laurie	Bonjo	Counseling & School Psychology	2026	x	5/7
Beena	Achhpal	Curriculum & Learning	2027		7/7
Maria	Diamantis	Curriculum & Learning	2024		7/7
Jennifer	Cooper Boemmels	Earth Science	2025		7/7
Younjun	Kim	Economics	2027		7/7
Peter	Madonia	Educational Leadership & Policy Studies	2026		5/7
Paul	Petrie	English	2026		6/7
Mike	Shea	English	2027		5/7
Eric	West	Environment, Geography, & Marine Sciences	2025		6/7
Sandip	Dutta	Finance & Real Estate	2025		5/7
Amanda	Strong	Healthcare Systems & Innovation	2025		6/7
Matthew	Rothbard	Health & Movement Sciences	2025	x	4/5
Daniel	Swartz	Health & Movement Sciences	2025		7/7
Christine	Petto	History	2026		7/7
Polly	Beals	History	2026		7/7
Yan	Liu	Information & Library Sciences	2027		7/7
Cindy	Simoneau	Journalism	2027		7/7
Elizabeth	Wilkinson	Library Services	2026		7/7
Amy	Jansen	Library Services	2025		6/7

Alison	Wall	Management & International Business	2025		7/7
Melvin	Prince	Marketing	2026	✖	4/7
Sebastian	Perumbilly	Marriage & Family Therapy	2025		7/7
Ray	Mugno	Mathematics	2025		7/7
Owen	Biesel	Mathematics	2025		7/7
Jonathan	Irving	Music	2026		6/7
Deborah	Morrill	School of Nursing	2026		7/7
Elizabeth	Hurlbert	School of Nursing	2027		6/7
Virginia	Metaxas	Part-Time Faculty (HIS)	2026		7/7
Garbielle	Ferrell	Part-Time Faculty (JRN)	2025		7/7
Michael	Sormrude	Part-Time Faculty (BIO)	2024	✖	0/7
Michele	Delucia	Part-Time Faculty (PSY)	2024	✖	0/7
Rex	Gilliland	Philosophy	2026		7/7
Evan	Finch	Physics	2027		7/7
Jonathan	O'Hara	Political Science	2025	✖	0/7
Katherine	Marsland	Psychology	2025		5/5
		Psychology	2027		
John	Nwangwu	Public Health	2027		7/7
Deron	Grabel	Recreation, Tourism, & Sport Management	2026		6/7
Isabel	Logan	Social Work	2026		7/7
Stephen Monroe	Tomczak	Social Work	2025		7/7
Gregory	Adams	Sociology	2026		7/7
Joan	Weir	Special Education	2027		6/7
Douglas	Macur	Theatre	2027		5/7
Tricia	Lin	Women's & Gender Studies	2025		6/7
Luke	Eilderts	World Languages & Literatures	2026		5/7
Natalie	Starling	SCSU Faculty Senate President	2025		7/7
Dwayne	Smith	Interim SCSU President		✖	6/7
Barbara	Cook	Chair, Graduate Council			7/7
Meghan	Barboza	Chair, Undergraduate Curriculum Form			6/7
Riyanna Sarah	Singleton Wittman	SGA			

GUESTS

Amelia
Dominika
Dyan Robinson
Julia Irwin
Kari Swanson

RJ Simpson
Susan Garlington
Trevor Brolliar
William Moroz

The following senators are empowered by the Faculty Senate to represent the Faculty Senate and thereby represent the faculty body in their role and contributions to the respective committee/group in which shared governance of business is being conducted with a duty to report back to the Faculty Senate minimally once per semester (additional reports determined by the respective representative or upon request by the Faculty Senate). It is recommended representatives also seek the Faculty Senate's support and endorsement for matters determined by the respective representative or upon request by the Faculty Senate.

Faculty Senate Representation	Faculty Senate Representative(s)
Administrative Faculty Senate	Kate Marsland
Chief Financial Officer (CFO) Search Committee	Natalie Starling
Chief Information Officer (CIO) Search Committee	Matt Rothbard
Dean of the College of Education Search Committee	Joan Weir
DEI Advisory Council	Laurie Bonjo
Early College Experience	Joan Weir
Faculty Development Advisory Committee (FDAC)	Kate Marsland
Social Venture Partners	Mike Shea Jeff Webb Melanie Uribe Stephen Monroe Tomczak Michael Sormrude
Strategic Action Plan Subcommittees <ul style="list-style-type: none"> • Advancing Social Justice • Maintaining Academic Excellence • Engaging our Community 	Miriah Kelly Kenneth McGill Michael Sormrude
Undergraduate Curriculum Forum (UCF) liaison	Cindy Simoneau
University Budget and Space Committees	Nicholas Edgington Cindy Simoneau Christine Petto
University Library Committee (ULC)	Amy Jansen 1 Representative Unfilled
VP of DEI Search Committee	Laurie Bonjo Elizabeth Hurlbert

December 4, 2024

Faculty Senate President Natalie Starling called the 7th meeting of the Faculty Senate to order at 12:12 p.m. via Zoom.

I. Announcements

- A. C. Simoneau shared the recent publication of *Crescent* magazine.
- B. M. Diamantis reminded faculty to turn in their book orders for the spring 2025 semester.
- C. L. Eilderts announced the results of the election to serve on the search committee for the Dean of the College of Education. J. Weir will represent the Faculty Senate on that search committee.
- D. N. Starling shared information regarding the listening session for the upcoming Presidential search and encouraged senators to attend.
- E. N. Starling shared her appreciation for the work and support of O. Biesel, M. Diamantis, and D. Macur during the Faculty Senate Secretary's absences in October and November.
- F. N. Starling shared that, just prior to the meeting, she received notification from the President's office that President Smith had received the final NCHEMS report. This information is included in the minutes below. A meeting on the final report was scheduled on December 5 from 9-10 a.m.
- G. N. Starling shared that the Newer Faculty Discussion Group would hold a meeting on December 13th. Please send RSVP to P. Crowley.

II. Minutes of the previous meeting held on November 13, 2024, were accepted as distributed.

<https://inside.southernct.edu/faculty-senate/meetings>

III. Faculty Senate President's Report

<https://inside.southernct.edu/faculty-senate/meetings>

- A. N. Starling provided an update on the ACT framework, clarifying that it is an initiative proposed by the Board of Regents (BoR). A summary of her meeting with BoR Chair M. Guay will be provided before his visit to the Faculty Senate on January 29th. The initiative aims to better organize institutional information to communicate effectively with the public and legislature. Unlike past processes such as the APP review, ACT is not expected to impose uniform key performance indicators (KPIs) across institutions but will recognize their uniqueness. Concerns were raised regarding the lack of faculty involvement in the development of the framework, emphasizing the importance of shared governance moving forward. N. Starling confirmed that the Faculty Senate is not considering boycotting the initiative. However, faculty should closely monitor the process and engage in discussions to ensure meaningful outcomes. M. Shea, the university's representative to the Faculty Advisory Council, shared insights into the BoR's efforts to improve communication with institutions. He expressed optimism about M. Guay's leadership, noting his engagement and willingness to listen to faculty concerns. M. Shea acknowledged that redundancies in such initiatives might stem from systemic challenges and changes in leadership rather than intentional oversight. J. Irwin reported that faculty engagement in the ACT framework will be discussed in an upcoming community meeting. The framework is still in its early stages, and faculty will have opportunities to provide input as it evolves. Efforts are underway to clarify the next steps and timeline, with a focus on ensuring meaningful faculty involvement.

IV. Guest: S. Wittman, Student Government Association (SGA)

- A. The SGA presentation focused on the new course modalities adopted by the university and their impact on students, particularly non-traditional students with diverse responsibilities such as caregiving and employment. SGA expressed support for the new modality definitions, emphasizing their improved clarity and flexibility for students. However, they requested faculty to clearly define class modalities in syllabi to help students better plan their schedules and accommodate their lifestyles. A key concern raised was the inconsistency in adhering to chosen course modalities, with students reporting unexpected changes mid-semester. SGA urged faculty to maintain the

originally stated modality unless extraordinary circumstances arise. The need for improved communication and transparency regarding course expectations was highlighted as essential to supporting students and aligning with the university's social justice mission. The SGA recommended the following: Faculty should provide explicit details in syllabi regarding class modality, schedule expectations, and time commitments to ensure students are well-informed. Faculty should adhere strictly to the declared course modality to prevent disruption to students' schedules. Encouragement for faculty and students to engage in online learning training offered by the IT department to ensure effective participation in digital learning environments. SGA advocated for greater accessibility to IT support and resources to help both students and faculty navigate online learning effectively.

- B. Senators engaged in discussions regarding the challenges faced in implementing the new modalities and the importance of maintaining clear expectations. Concerns were raised about potential conflicts with faculty autonomy and academic freedom, with a need to balance transparency with flexibility in course planning. Faculty members were reminded that course modality changes are not permitted once the semester begins, and it is crucial to respect the published details in Banner. The Faculty Senate Technology Committee and IT representatives acknowledged ongoing efforts to improve technological support and communication surrounding course modalities. Senators were encouraged to share the SGA's feedback with their departments and report faculty needs regarding modality clarity and technology support. Further dialogue and collaboration between faculty and SGA will continue, with potential future surveys and discussions to refine online learning experiences. Faculty Senate leadership will coordinate with administration to ensure compliance with policies while addressing student concerns.
- C. N. Starling thanked S. Witteman and SGA for their valuable insights and encouraged ongoing collaboration to address student needs effectively.

V. Reports of the Standing Committees

- A. The reports of the Standing committees were received.
- B. Academic Affairs (M. Diamantis)
 - i. Faculty members were reminded to submit their textbook orders for the Spring 2025 semester. Department chairs and faculty should inform the bookstore of their textbook selections or notify them if no textbooks will be used. A request was made to include an option on the bookstore order form for faculty going on sabbatical or not using textbooks to prevent unnecessary follow-up notifications. M. Diamantis will relay this suggestion to the bookstore.
 - ii. Concerns were raised about the bookstore's policy of not offering previous editions of textbooks, which could provide cost savings for students. Faculty expressed frustration with the high cost of textbooks and the bookstore's perceived inflexibility in accommodating more affordable options. It was noted that publishers often dictate availability, and the bookstore may have limited control over which editions they can procure. A request was made for a formal written bookstore policy on textbook edition availability to provide faculty with clarity. M. Diamantis will follow up on obtaining this information. Students can use financial aid to purchase textbooks and supplies from the bookstore, which is an important consideration for faculty when recommending course materials. Faculty members must explicitly indicate their preference for hard copies only when submitting orders, as the bookstore's default may include electronic versions unless specified otherwise. P. Petrie emphasized that simply checking the "hard copy only" option on the order form is insufficient; faculty must also email the bookstore manager directly to ensure e-texts are not ordered. Faculty discussed challenges related to students seeking cheaper textbook alternatives outside the bookstore, which can impact bookstore stock levels and ordering processes. M. Diamantis confirmed that the bookstore tracks textbook purchase data and will provide insights into how many students acquire materials through the bookstore versus other sources. Faculty are encouraged to communicate any

additional concerns or suggestions regarding textbook orders to the APC. APC will revisit these issues in the spring and provide further updates based on faculty feedback and bookstore discussions.

- iii. APC discussed a resolution to exempt student teaching courses from midterm grade submissions due to their unique nature. Faculty involved in student teaching courses are encouraged to review the committee minutes and provide feedback before a resolution is presented in the spring.

C. Finance (C. Simoneau)

- i. There are no scheduled university budget or space committee meetings at this time.
- ii. Faculty are encouraged to submit travel requests well in advance to assist the travel office in encumbering funds efficiently. Travel funds are available through the summer and expire at the end of the current academic year (late August). Faculty are reminded to plan their spring and summer travel accordingly.
- iii. C. Simoneau serves as one of two faculty representatives on the Sustainability Task Force, which is preparing a financial report due in early January. The report is primarily focused on financial sustainability, closely tied to enrollment numbers and Board of Regents (BoR) policies, including the current tuition freeze for the upcoming academic years. The financial aspects of sustainability align with previous budget presentations, considering projected enrollment and funding constraints beyond the current biennial budget cycle. The report will be submitted to the President's Office and subsequently to the BoR during the winter break. An update will be provided upon the Senate's return in the spring. The largest costs to the university are personnel (faculty and staff salaries) and operational expenses (facilities maintenance and utilities). Discussions are ongoing regarding Operational Expenses (OE) funding and potential areas for efficiency improvements, though no specific proposals have been made. There are no current plans to cut academic programs as part of the sustainability initiative. Efforts are being made to explore partnerships for certificates and workforce development programs that align with market needs and enhance programmatic offerings. The potential R2 research designation for the university is expected to be a significant factor in financial planning. If awarded, it could provide new funding opportunities and position the university as the only CSU in the state with this designation. Official confirmation is expected in January.
- iv. A question was raised regarding how the potential R2 designation might impact the Collective Bargaining Agreement (CBA) given the university's unique position within the system. C. Simoneau deferred to the Provost and AAUP representatives for further clarification on this issue. The question will be forwarded to J. Irwin and K. Swanson for follow-up.
- v. Faculty Senate members expressed appreciation for Cindy's thorough and ongoing updates on financial matters. C. Simoneau reminded the Senate that her term will be concluding soon, and a successor will need to be identified.

- D. N. Starling asked the body if there were any objections to moving to New Business to take up the resolution on the creation of an ad-hoc committee. Hearing none, the body moved to this item of business.

VI. New Business

- A. N. Starling, on behalf of the Executive Committee, moved to approve the Ad-hoc Committee for Formalizing Faculty Advising.
 - i. After discussion, the body moved to a vote.
 - 1. Vote tally
 - a. Yes..... 39
 - b. No..... 1
 - i. The motion to form an ad-hoc committee **passed**.

- B. L. Eilderts moved to open nominations for Faculty Senate representatives to serve on the newly approved ad-hoc committee.
 - i. C. Petto nominated P. Beals.
 - 1. P. Beals declined the nomination.
 - ii. P. Beals nominated J. Webb.
 - 1. J. Webb accepted the nomination.
 - iii. M. Shea nominated P. Petrie.
 - 1. P. Petrie declined the nomination.
 - iv. J. Weir self nominated.
 - v. C. Petto nominated V. Metaxas.
 - 1. V. Metaxas accepted the nomination.
 - vi. J. Weir rescinds her self-nomination.
 - vii. Hearing no additional nominations, **J. Webb and V. Metaxas were approved** as Faculty Senate representatives to the ad-hoc committee.

- C. N. Starling asked the body if there were any objections to taking up the department name change under new business; and the poll for the APC to consider taking up department guidelines for promotion and tenure. Hearing none, the body moved to these items of business.

- D. J. Weir presented the rationale for the department name change from the Department of Special Education to the Department of Inclusive Education and Behavioral Science.
 - i. After discussion, the body moved to a non-binding vote.
 - 1. Vote tally
 - a. Yes..... 35
 - b. No..... 2
 - i. The Faculty Senate **endorses** the change in department name.

- E. The APC is seeking faculty input on whether departments should develop their own Promotion and Tenure (P&T) guidelines. Previous efforts to collect feedback through a poll were unsuccessful, as results were not obtained, and limited input was received from departmental representatives. The proposed guidelines would serve as an official reference document to complement existing policies outlined in the Collective Bargaining Agreement (CBA) and Faculty Senate regulations. The guidelines would provide discipline-specific explanations and justifications for criteria under areas such as creative activity and service, ensuring relevance to each department's field. The goal is to offer clarity and consistency in faculty evaluations while maintaining alignment with institutional policies.
 - i. After discussion, the body moved to a vote.
 - 1. Vote tally
 - a. Yes..... 26
 - b. No..... 12
 - i. The poll to gauge interest in pursuing this initiative was **approved**.

- VII. Reports of the standing committees (cont'd)
 - A. No additional information from the standing committees.

- VIII. Special Committees
 - A. Reports from UCF and Grad Council were received.

- IX. Adjournment
 - A. J. Webb **moved to adjourn. Seconded.**
 - i. The meeting adjourned at 2:00 p.m.

L. Eilderts
Secretary

Ad-hoc Committee for Formalizing Faculty Advising

Rationale: (1) collaborative effort to support formalizing advising activities of the faculty and faculty purview over advising by uniting representatives of the community and the Faculty Senate within one committee and (2) to address the faculty's needs for implementing quality advising activities

Chair of ad-hoc committee: according to a majority vote of the ad-hoc committee during the first meeting

Membership invitations:

- two (2) faculty senators (faculty)
- the two (2) current Personnel Policy (PPC) co-chairs or designee(s) from PPC (faculty)
- one (1) representative from UCF (faculty)
- one (1) representative from Grad Council (faculty)
- at least one (1) and no more than two (2) SCSU-AAUP representatives
- at least one (1) and possibly additional members of the faculty (faculty). The number and selection process to be recommended by the ad hoc committee during the first meeting.
- at least one (1) member invitation offered to Academic Affairs representative (admin)
- at least one (1) member invitation offered to Student Affairs representative (admin)
- at least one (1) member invitation offered to the professional advisors (staff)
- one (1) graduate student (students/scholars), one (1) transfer undergraduate student (students/scholars), one (1) SGA representative (students/scholars)
- and other members as recommended by the ad hoc committee

Meeting Schedule:

- The meeting schedule and duration to be determined by the ad hoc committee during the first meeting.

Reporting rate to the Faculty Senate: at least monthly or at greater intervals as determined by the ad hoc committee or the Faculty Senate

Initial Charges

The committee shall...

Charge 1: gather and receive recommendations and information from constituents and other groups across the university community

Charge 2: support both consistency and, when and where appropriate, specificity in faculty advising by establishing definitions and a general protocol for faculty advising activities and duties (e.g., what advising is/is not, internal and external accreditation needs, how to report concerns regarding students, communication among stakeholders, etc.)

Charge 3: support encouragement, reinforcement, and accountability for faculty advising activities by developing a recommendation for load credit assignment for faculty advising (e.g., reassigned time formula, possible course credit linkage or designation, how credits may be assigned, etc.)

Charge 4: establish a pilot for at least one volunteering department to implement in Fall 2025

Charge 5/other: upon presentation to the Faculty Senate, consideration to be given to the ad hoc committee's recommendation for additional charge(s)

NCHEMS Final Report

[Please click here to access the report \(Southern login credentials are required\).](#)

Dr. Smith just received the final NCHEMS Report. We wanted to make sure we sent it to you.

The meeting on the final report is tomorrow [December 5] from 9:00 a.m. – 12:00 p.m.

There will be time for public comment towards the end of the meeting.

Please find the report, attached. The Webex meeting information is below:

<https://ctedu.webex.com/ctedu/j.php?MTID=m3abca1e29fd66f18bbed4443658cf07c>

MODALITY PROPOSAL

The Student Government Association

Board of Academic Experience

Modality Definitions

- Hybrid (HB)
- Hybrid Limited (HL)
- Online Synchronous (OS)
- Online Asynchronous (OA)
- Online Blended (OB)

The Student Government Association Board of Academic Experience approves of the new class modality definitions:

- **Less variability**
- **More options for students to pick from**

Many SCSU students assume other identities:

- **Caretakers**
- **Parents**
- **Working outside jobs**

With these variabilities, and in accordance with our social justice mission, defining the class modality in each class syllabus would assist students in planning their schedules.

Equal Accountability

We recognize unpredictability in the lives of both students and faculty , but believe in transparency in schedules when applicable out of consideration and convenience for busy students.

“The syllabus is subject to change”

- **This phrase is in many syllabi**
- **The statement is well within the rights of faculty to include, but modalities are not subject to change once the class has started**
- **Student are reporting sudden, ongoing changes to class modalities.**

Accessibility

- Clear communication with students should be the standard.
- At a social justice university, we need to take a step further in supporting our nontraditional students.
- At an institution that is working to become more academic, class modalities need to be defined.
- Ensure online courses follow the Web Content Accessibility Guidelines (WCAG)
 - <https://www.w3.org/WAI/standards-guidelines/wcag/>

Support for online professors

The Student Government would like to endorse IT's online trainings, urging professors to take advantage of its resources to foster a better online learning environment.

Training for online teaching is available:

<https://www.southernct.edu/online-learning/onlinepolicies>

Office of Online Learning

New changes to Blackboard next semester:
<https://inside.southernct.edu/online-learning/ubn>

New Faculty

- New faculty members are particularly encouraged to contact the Office of Online Learning at OnlineLearning@SouthernCT.edu for an overview of online teaching resources and best practices at the university.

Continuous Professional Development

- **Periodic Training:** As technology evolves and new tools become available, all faculty members are encouraged to periodically schedule training sessions with the Office of Online Learning.
- **Scheduled Professional Development:** The Office of Online Learning regularly schedules professional development sessions, which are announced on the [Office's website](#) and through campus-wide emails.

Southern has a link published on their websites which includes details regarding online classroom policies including course modalities, program modalities, and technology tools:

<https://www.southernct.edu/online-learning/onlinepolicies>

“It would be helpful if hybrid classes would announce exactly when online versus in person classes were held in the syllabus so people could arrange their schedules accordingly.”

“First week or so all class work was posted for the week. Now my class work is posted on a Wednesday and only one part of the work is available. The inconsistent posting is messing with my learning”

“My course was hybrid but my professor only held the class virtually.”

SCSU **Student** **Insight**

“Online class started 20 minutes early because the professor wanted to cover content that she did not get too last class.”

“My online class professor did not hold our virtual class for the full time (1 hour and 15 minutes). He used his personal Zoom account which only allowed for a 30-minute class.”

“My * class was originally in person. After midterms a few classes were canceled and eventually moved to shorter sessions online”**

Our Proposal

The Student Government Association is asking, to the extent possible, for complete transparency regarding defining class modalities and time requirements on syllabi.

We ask that faculty members stick to the chosen modality of the class unless extreme circumstances arise.

If faculty members are using online formats, please take advantage of online resource training provided by IT.

Thank you for your time.



OFFICE *of the*
STATE COMPTROLLER

REPORT TO THE GOVERNOR
*On the Connecticut State
Colleges and Universities
Special Examination*

December 2024

Comptroller Sean Scanlon

165 Capitol Avenue, Hartford, Connecticut 06106 | (860) 702-3300

Report to the Governor *on the*
Connecticut State Colleges and Universities Special Examination

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EXECUTIVE SUMMARY

On October 25, 2024, following recent reporting on spending by the Chancellor of the Connecticut State Colleges and Universities System (CSCU), Governor Lamont formally requested that my office examine the financial records and policies for institutions governed by the Board of Regents (BOR).

After requesting financial records and policies from CSCU and the State's purchasing card (P-Card) vendor, my office reviewed both transactions attributed to CSCU leadership and a sample of other spending by staff to identify instances of inappropriate spending, disregard for financial practices and procedures, inadequate reporting, and misuse of state property.

Our audit identifies several transactions by certain university leadership that did not have adequate documentation or did not follow university policies. Additionally, our review of state vehicles assigned to leadership staff found instances of missing logs and potential violations of state procedures regarding vehicle usage.

The audit also concludes CSCU lacks a comprehensive, uniform purchasing policy that should provide sufficient internal controls against misuse. We strongly recommend a stronger P-card policy with more checks and balances, greater enforcement mechanisms and more stringent reporting requirements to ensure appropriate spending.

In the wake of budget deficits and tuition increases at CSCU, it is imperative that the public and students who our universities serve have the confidence that public funds are used appropriately, and that financial practices and policies are followed.

State law provides the CSCU system broad autonomy over its purchasing policies and procedures. While our office has statutory authority to audit the system's finances, we have limited ability to enforce changes to their practices.

In light of this report's findings, however, I strongly urge CSCU take swift action to adopt our recommendations and build a culture that better reflects the financial realities facing our institutions.



SUMMARY OF PROCEDURES AND FINDINGS

Under the authority granted by Connecticut General Statutes (CGS) §3-112(b), OSC requested the following financial records for CSCU and the four regional universities for the period starting July 1, 2021 through October 2024:

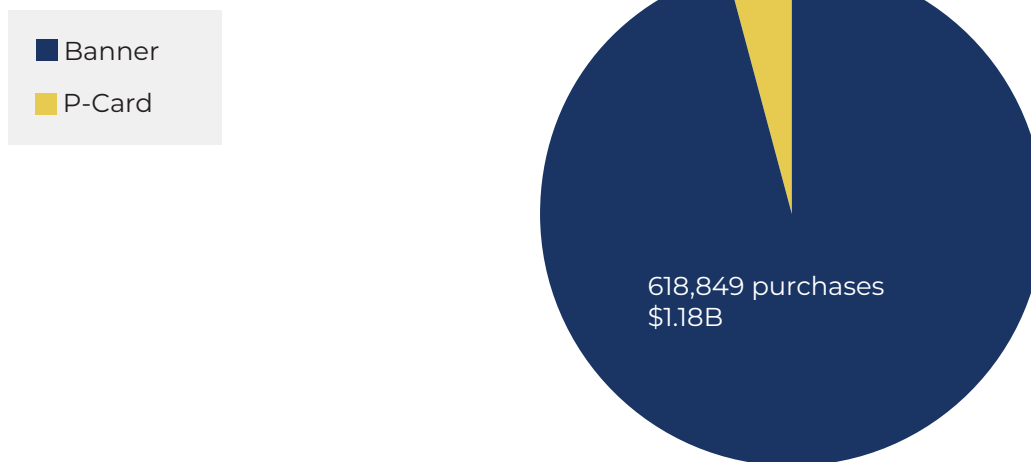
- A detailed report of all P-Card activity for all P-Cards throughout the CSCU System;
- A detailed report of all gas card activity for all gas cards throughout the CSCU System in Excel format;
- Detailed check register, disbursement, and vendor activity reports from Banner for the entire CSCU System;
- Detailed general ledger reports from Banner for the entire CSCU System ; and
- Annual fleet listings of the CSCU System that includes the individual the vehicle is assigned to when applicable.

The review of these records included, but was not limited to, the review of adherence to applicable state and university financial policies, the adherence to proper IRS tax reporting requirements, and the connection of these expenditures to the educational mission of the CSCU system.

Disbursements for expenditures are made by check or automated clearing house (ACH), an electronic network for processing transactions between financial institutions, via the CSCU Financial system (Banner) or by credit card using the State's P-Card issued by JP Morgan bank.

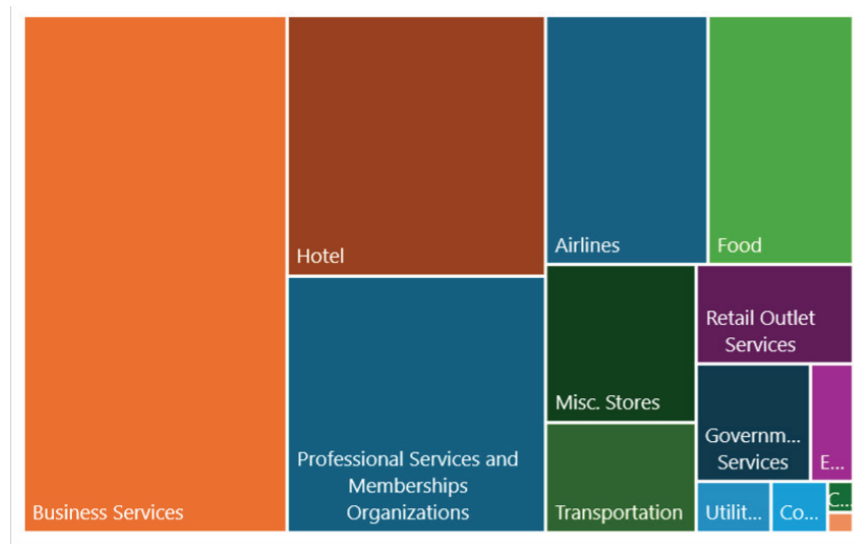
The total number of disbursements for the review period were 628,849 from Banner and 182,252 by P-Card, amounting to \$ 1,184,473,919 and \$50,080,277, respectively.

CSCU Spending, P-Cards vs. Banner 7/2022-10/2024

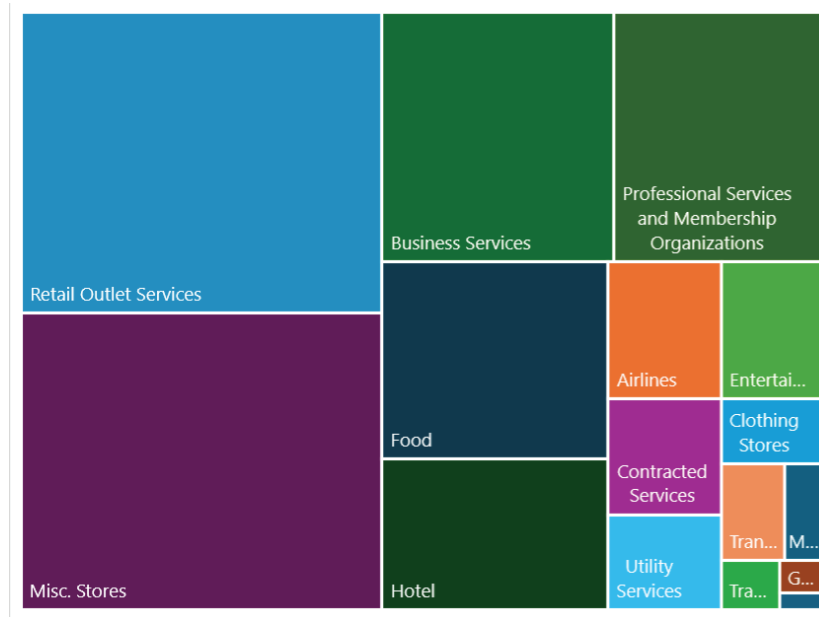


The P-Card transactions were provided by JP Morgan and consisted of 182,252 transactions from 26,135 billing cycles from 07/2021 - 10/2024. The P-Card spend was divided into two groups for review: leadership and staff. The graphs below show the spend by category or each group.

P-Card Spending: CSCU Leadership July 2022- October 2024



P Card Spending: CSCU Staff July 2022- October 2024



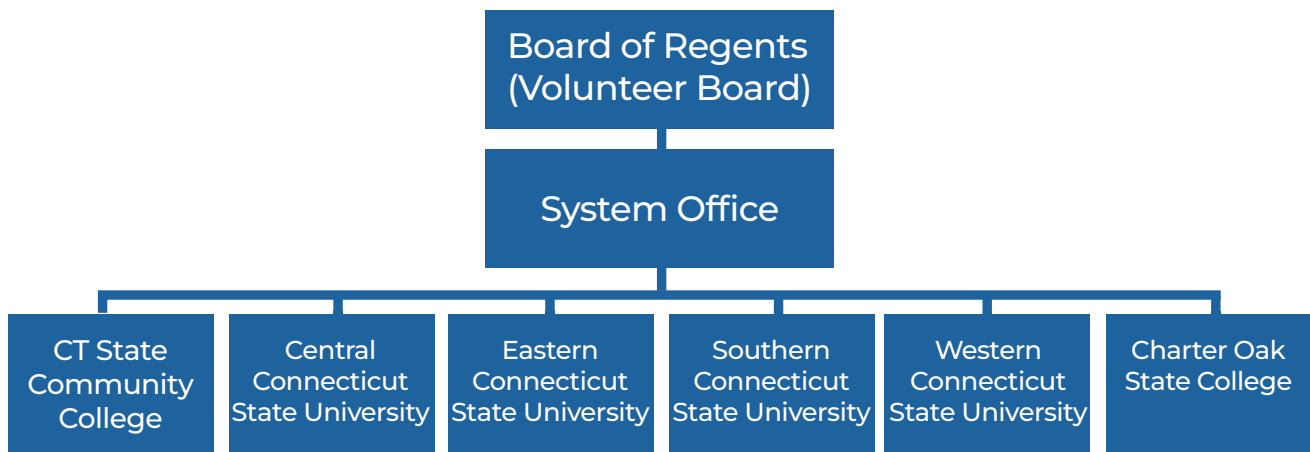
From these records, OSC selected 76 billing cycles containing 1,031 transactions for a detailed review of backup documentation and compliance with policies. The results of this review identified findings of incomplete documentation, restricted purchases, and policy violations.

Based on those findings, OSC is making a number of recommendations to improve the processes and internal controls related to P-Card usage including the standardization of policies across the system, segregation of duties, the establishment and enforcement of repercussions for misuse, and an ongoing system of training and re-training for new and existing cardholders.

STRUCTURE OF CSCU

Chapter 185 of the CGS describes the structure of the CSCU. CGS §10a-1a established the Board of Regents of Higher Education which shall oversee CSCU, the regional community-technical colleges, and Charter Oak State College (COSC). This board shall appoint the president of CSCU (Chancellor) who shall directly oversee the system office and who shall be assisted by two appointed vice-presidents, one in charge of the state university system, and the other in charge of the regional community-technical college system.

Each state university shall have its own Board of Trustees who shall appoint a President of that constituent unit. The Chancellor shall work to build interdependent support among the Connecticut State University System, the regional community-technical college system (CT State Community College) and Charter Oak State College, balance central authority with institutional differentiation, autonomy, and creativity, and facilitate cooperation and synergy among the constituent units so each may fulfill its mission.



PROCUREMENT CARD (P-CARD) REVIEW

The State of Connecticut began allowing the use of state-issued credit cards (Procurement or P-Cards) in 1998. The P-Card program was designed to give agencies flexibility in procurement for small non-recurring purchases. It helped to alleviate the entering of Purchase Orders for vendors which might be used infrequently or even a single time. The P-Card program was intended to supplement existing purchasing policy, not eliminate or supersede internal controls.

The Connecticut State Colleges and Universities (CSCU) System currently has 1,070 P-Card users across all of its constituent units.

Due to the structure of the system the central office (including the community colleges) and each university have their own policy on P-Card use.

A strong P-Card policy gives users uniform guidance with clear expectations and instruction on procedures for different types of scenarios. It should describe not just the correct use, but also the possible types of misuse. Policies should also give guidance on repercussions from misuse (ex. Point systems for infractions), provide clear segregation of duties related to procurement with this method of payment (ex. Pre-approvals for certain programs), and include good internal controls for the program (ex. Post-audit checklists). Because this program takes the place of normal procurement processes, there should be a strong requirement in the policy for detailed documentation supporting each transaction to eliminate fraud, waste, and abuse.



FINDINGS

As part of this review of the CSCU System's financial records and policies, JP Morgan provided P-Card transaction data for 1,753 cards during the review period of FY22-25, 1,070 of which were still active on October 24, 2024.

We reviewed the P-Card usage of top-ranking personnel (e.g., Presidents, Vice Presidents, the Chancellor, etc.) along with random staff below the leadership level that showed a variety of transaction types within the System Office and State Universities.

We judgmentally selected 76 P-Card statements, requested the backup documentation, and conducted a post-audit resulting in the review of 1,031 individual transactions out of the 182,252 transactions which occurred during fiscal years 2022 through 2025 for a total of \$50,080,277.

Based on our review, we noted the following:

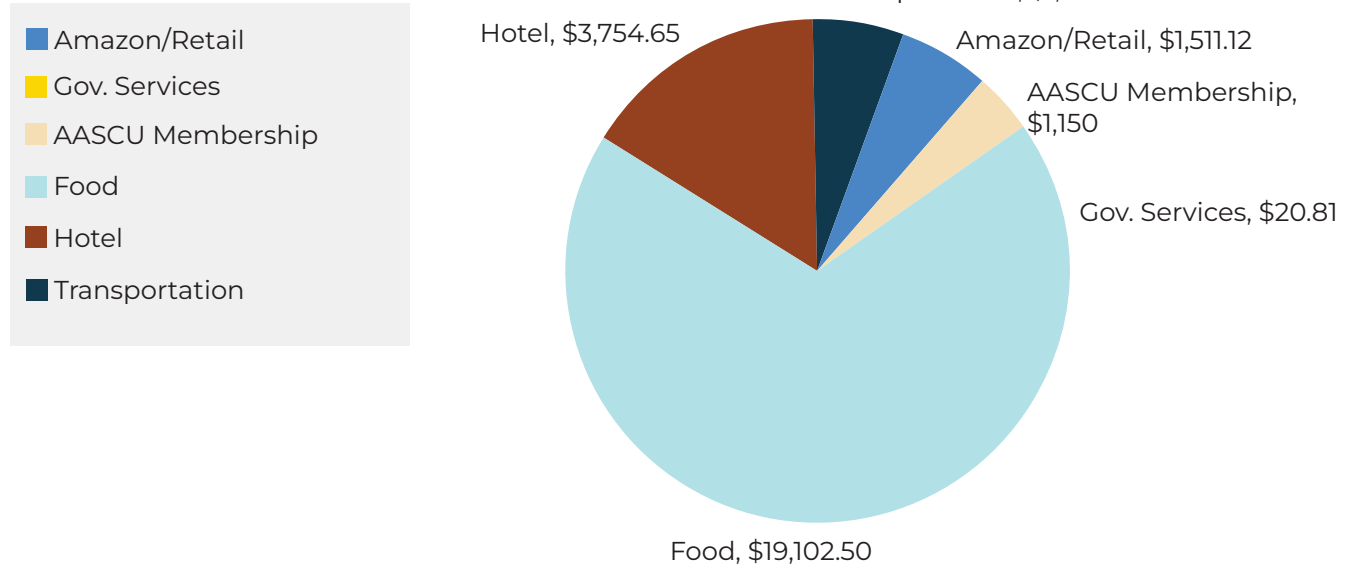
- Three (3) marketing payments that exceeded the policy limit for individual users and should not have been paid using the P-Card were selected as part of our review. Upon discovering that employees were using split payments to avoid the P-Card limits for authorized expenditures, we investigated further and discovered that fifty (50) payments were made for amounts less than the invoiced total due to card capacity and timing of charges. This resulted in several charge declines from lack of available card balance and multiple individuals using their cards to split payments due to charge declines.
- One instance where a notation was made that a flight was cancelled and credit issued, but the credit did not appear on subsequent statements.
- One instance where tickets to Friends of the Danbury Museum and Historical Society Authority Gala were purchased for the Interim President of WCSU and their spouse.
- One instance where a single ticket was purchased for a sports event which did not involve CSCU associated teams. This was not logged as a business meeting or scouting event.
- Three (3) instances where an employee with an assigned state vehicle utilized a livery service for travel. Trip details listed below in section regarding the Chancellor.
- Twenty (20) instances where the P-Card was used to purchase restricted items without special approval or documentation (ex. dry cleaning, fuel, room service, office supplies, flowers, cellphones and IT assets, decorations).
- One instance where a capital asset (Freezer) was purchased, against P-Card policy, and there is no documentation regarding it being added to the institution's capital asset list.
- One instance where three identical charges were made with only one invoice submitted as backup. The extra charges did not appear to be properly disputed or refunded.
- One employee routinely failed to supply supporting documentation within ten (10) days of the end of the billing cycle, as required by the SCSU P-Card policy, and filled out missing receipt forms only when our review required it. This also led to multiple inaccurate descriptions of the purchase being used on the missing receipt form.
- Eighty-two (82) instances where purchases were made without properly removing or refunding state sales tax.
- Forty (40) instances where an itemized receipt for goods was not included in the monthly documentation.



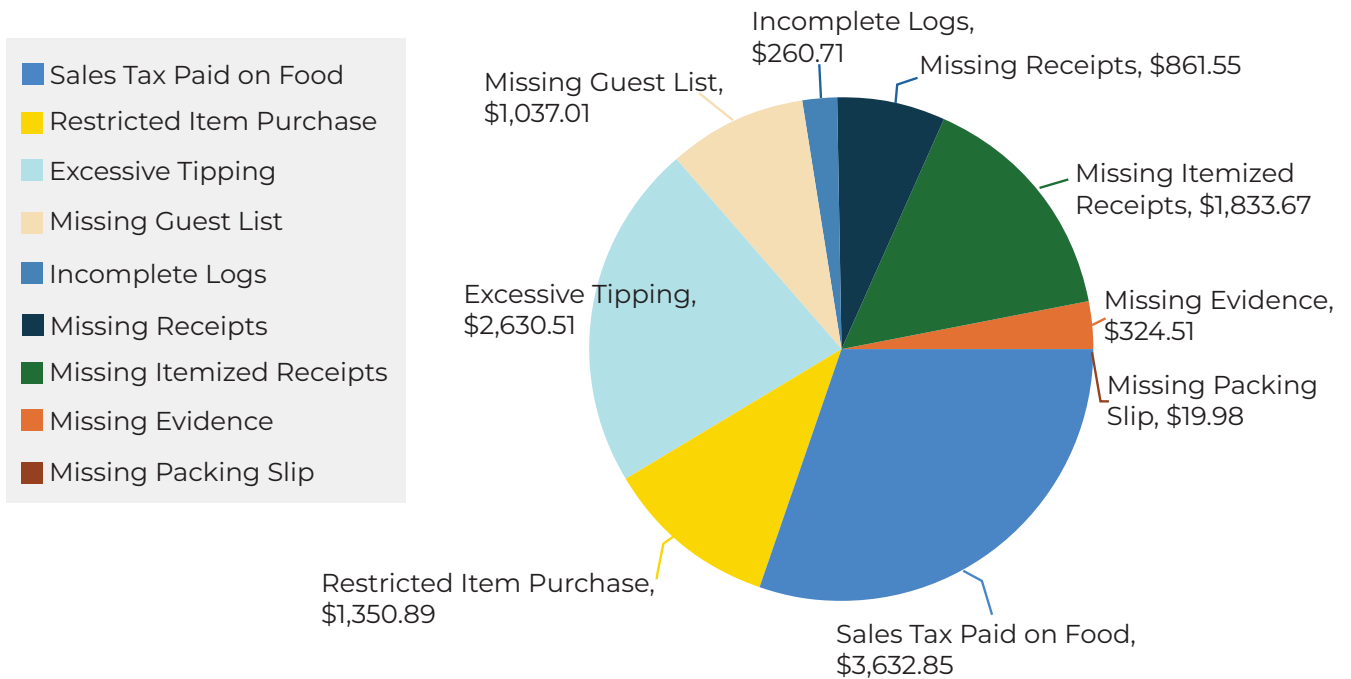
- Ninety-six (96) instances where Travel Authorizations were missing.
- Two-hundred twenty-seven (227) instances where Packing Slips, and other additional backup documents required by policy are missing or were not supplied.
- Ninety-five (95) instances where receipts or supporting documentation were not included in the monthly log supporting the charges. An additional thirty (30) instances where a missing receipt form was supplied in place of a lost receipt. In some cases, these missing receipt forms were submitted months after the reporting period was closed and/or were filled out with inaccurate information due to the time lapse (gasoline charges listed for actual auto detailing services).
- Nineteen (19) cases where the submitted log was incomplete or inconsistent with the policy.
- Fifteen (15) instances where a required purchasing log was not provided.
- Twenty-three (23) instances where excessive tipping was shown, ranging from 22% up to 36% gratuity.
- Several instances where emergency funds were used to pay student personal debts to companies (Verizon, Eversource, etc.) exceeding \$600. This constitutes a financial benefit to the student and may require that corresponding 1099 forms be issued by the educational institution for those amounts. CSCU noted that they had not considered this as the payment was not made directly to the student.

CHANCELLOR

Chancellor P-Card Spending FYs 22-24



Chancellor Spending by Violation



Our review of the Chancellor's spending practices centered on two topics: meals and transportation.

Between assuming the office of Chancellor on July 1, 2021 and October 24, 2024, the Chancellor charged \$27,125 to his P-Card.

The majority (70%) of the Chancellor's P-Card transactions are for meals designated as business meetings.

CSCU policy allows P-Card holders to use their cards for meals with the following requirements:

- Meals should be less than \$50 per person including tip
- Sales tax exemption should apply
- No alcohol may be purchased
- A written record of guests should be maintained
- An itemized receipt is necessary to verify compliance with the policy

During the period we reviewed, the Chancellor used his P-Card in some instances for meals over the \$50 limit, to purchase alcohol, and at times did not properly record guests. In 43% of the transactions we reviewed, the receipts were either missing or there were no itemized receipts.

Various other findings identified included 30 occasions where sales tax was paid, a violation of policy, as well as 18 occasions of excessive tips (in excess of 22%). The amount of tip is not a policy violation but a questionable use of university funds.

However, our review determined that the Chancellor did not technically violate the policy because, as Chancellor, the policy permits him to override the policy at his own discretion.

The Chancellor lives in New York State and commutes to his office in Hartford. In 2021, he was provided with a state vehicle. In 2024, he returned that state vehicle and will instead receive a \$24,000 annual car allowance.

The use of a state vehicle for personal business constitutes a taxable benefit to the employee. The value of the benefit is calculated per IRS requirements and is included in the employee's pay on form W-2. Employees given state vehicles are required to keep logs showing personal or business miles based on odometer readings taken at the start and end of each trip. The Chancellor had the use of a state vehicle from July 2021, through August 2024. In June of 2024, CSCU self-reported to the Auditors of Public Accounts for the State of Connecticut that discrepancies were found in the mileage reporting for the Chancellor's assigned vehicle. At the time of the reporting, it was noted that the errors appeared to be a result of administrative mistakes and gaps in procedure training. CSCU conducted an analysis to determine the actual value of the taxable benefit. Corrected W-2s were issued to the Chancellor for tax years 2021, 2022, and 2023.

In September of 2024, the Chancellor stopped using the state vehicle and began using his personal vehicle. He then began to receive a vehicle allowance to cover the expense. The vehicle allowance is paid bi-weekly in his paycheck and is taxable. It is the employee's responsibility to track the expense and make any adjustments to their tax returns in accordance with IRS regulation.

During our review period – during which the Chancellor also had a state vehicle – he used a car service on at least three occasions.

There was one charge for a car/driver service made on the Chancellor's assigned P-Card. The charge was for \$490, including tip, on November 20, 2022 for a trip from South Salem, NY to Stamford, CT. Additionally, a general review of transportation charges over \$500 found two similar charges made to the President's Office P-Card. On September 19, 2023, there was a trip from South Salem, NY with three stops in Hartford, a stop in Stamford, and drop off in South Salem, NY totaling \$1,263.00. On October 25, 2023, there was a trip from Hartford, CT with stops in New Britain, Killingly, and drop off in Hartford totaling \$784.00.

Our review determined that the use of a car and driver did not violate university policy, but these trips are of note as the Chancellor was provided with a state vehicle for their use.

In conclusion, while not technically violating state or university policy, we found that, in the absence of sound, comprehensive policies, the Chancellor utilized poor judgement when making P-Card purchases that were especially troubling given the financial stress on the CSCU system.

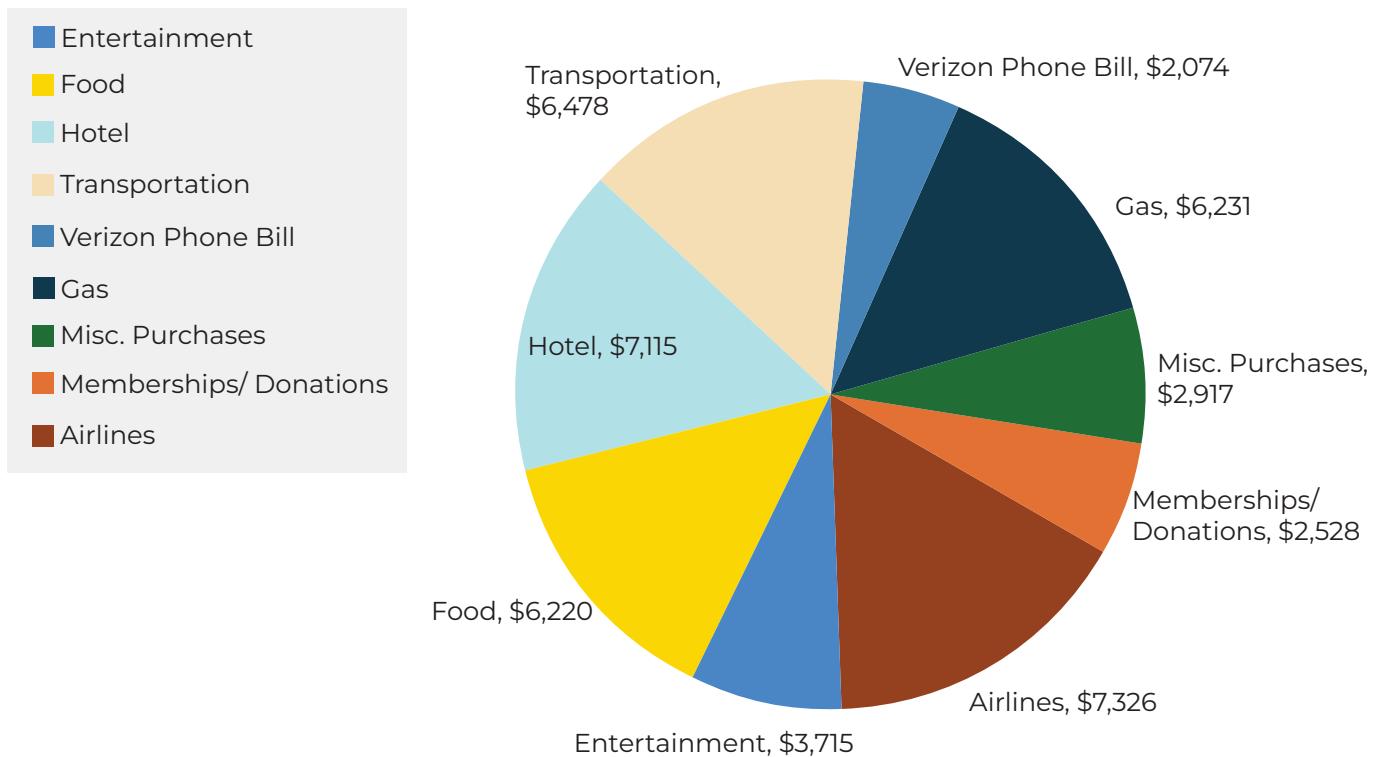
OTHER ADMINISTRATORS

President COSC

The President of Charter Oak State College's impermissible charges are almost entirely the payment of marketing invoices using a method called split payments. This is where the total monthly invoice is above the spending limit (Daily, Transactional, or Monthly) of the P-Card being used. Three split payments fell into our random selection criteria, but because of the splitting the associated invoices led us to discover a total of 50 charges totaling \$497,062.44 on two cards, assigned to the President and the marketing director, that violated P-Card policies regarding splitting payments to bypass cardholder spending limits. These payments, due to their amount and frequency, should have been processed through the university procurement office.

President SCSU

SCSU President Spending



SCSU President Spending by Violation



Our review of transactions for The Interim President of Southern Connecticut State University's P-Card shows a wide variety of infractions spanning almost every category of restricted purchasing and failure to follow many of the policy requirements for documentation and reporting of transactions. The most blatant of which was failure to supply receipts within 10 days of the close of the billing period. In many cases the receipts were never saved, and he created missing receipt forms only when we began our investigation. Due to the time between the purchases and his submittal of the missing receipt forms, two forms submitted falsely documented automotive detailing charges as fuel purchases. State sales tax was never removed or credited. He purchased a ticket to a Yale vs. Morgan State football game without stating that it was for a business meeting or scouting event. A flight purchased with the P-Card had a notation on the receipt saying \$745.99 was credited on Oct. 5, 2024 but did not show on any JP Morgan statements as a credit for that or any subsequent billing period.

SUMMARY OF TRAVEL LOG REVIEW

Findings:

As part of our review of the Connecticut State Colleges and Universities (CSCU) System's financial and operational activities, we reviewed the vehicle usage of top-ranking personnel (e.g., Presidents, Vice Presidents, the Chancellor, etc.) within the System Office and State Universities. For this review, we obtained the related policies and procedures in place and judgmentally selected several months to review amounting to 103 monthly vehicle usage logs within the period of Fiscal Years 2023 through 2025. Based on our review, we noted the following:

- Fifty-nine (59) instances where signatures were not present on vehicle usage logs indicating that the information had not been reviewed for accuracy and approved;
- Thirteen (13) instances where usage logs for one vehicle were not provided for the months selected. In effect, a review that vehicle's usage could not be completed;
- Three instances where monthly activity was reported in one lump-sum mileage amount rather than daily as required by policy;
- Seven instances where the monthly activity logs were not signed by the employee using the vehicle; and
- One instance where an employee with an assigned state vehicle purchased enough fuel (\$50.00) using the state P-Card to fill a vehicle on Saturday morning (3-30-24 9:19AM), the vehicle log shows a 2.6-mile trip for that weekend, and then used the same P-Card to purchase 10.26Ga (\$35.00) of fuel on Sunday evening (3-31-24 8:15PM).

In addition, we were provided with detailed usage reports documenting the activity of two vehicles maintained by the System Office. While reviewing the information on these logs, we noted several instances in which the top speed of the vehicles exceeded the State's top speed limit of 65 miles per hour. Specifically, we noted that of the 238 trips logged by these vehicles from July 2024 through November 2024, the vehicles exceeded the maximum speed limit of the state in 146 of those trips, or 61 percent of the time. Top speeds during those 146 trips ranged from 66 to 89 miles per hour, or one to 24 miles per hour over the maximum speed limit. Per the State of Connecticut's Vehicle Use Policy, the driver's responsibility while using a state vehicle includes obeying all motor vehicle laws. It should also be noted that we were not able to determine the actual speed limit of where these vehicles were driving, so the State's maximum highway speed limit was used for our analysis.

Further, we noted that multiple policies for the use of state vehicles exist within the CSCU System. We also found that the mileage logs used to track activity varied between institutions. This can lead to inconsistencies in the treatment of vehicle usage, taxable benefits related to the use of state vehicles and can cause confusion when determining what policy to apply (e.g., the institutions, the State's, or both). It also creates additional work when policies need to be updated. Additionally, the policies in place did not seem to address certain situations for vehicles assigned to leadership, which could lead to confusion or uncertainty in what is and is not allowed as far as the use of state vehicles as well as how that activity should be treated for compensation and tax purposes.



RECOMMENDATIONS

1. Reinstitute the internal audit function.

CSCU should reinstitute its internal audit function to provide analysis, evaluations, assurances, recommendations, and other pertinent business and compliance information to management and those charged with governance. The internal audit unit should ensure that strong internal controls exist and all units are adhering to them.

2. Establish a centralized P-Card policy.

CSCU System should establish a comprehensive centralized policy related to P-Card usage and restrictions. The policy should address training and expectations of cardholders, proper documentation, and segregation of duties in the approval process.

3. Use foundation funds for meals and entertainment.

CSCU should seek financial support from its various foundations to cover certain costs, such as food and entertainment, when it's related to networking, fundraising, or other business-related purposes rather than using a P-Card. This will eliminate the risk of unintentional violations of the CSCU P-Card policy as well as deter any misuse of P-Cards and State funds.

4. Set limits and review procedures for executive P-Card use.

If meals and entertainment cannot be shifted to foundation expenses, CSCU should evaluate its current policies and procedures to specifically address how they are applied to personnel in management positions. In the case of exceptions to certain spending limits for P-Cards for management, a secondary review and sign-off should be required to ensure that the exception to the policy is warranted. A secondary review and sign-off would also deter any misuse of the exception to the spending limit in place.

5. Establish a vehicle use policy.

The CSCU System should create a system-wide vehicle use policy that addresses all relevant situations to ensure consistency across the CSCU System with respect to the usage of state vehicles and how that usage should be treated for compensation and tax purposes. It should also take steps to ensure the policy in place is adhered to and enforce disciplinary actions when infractions occur to mitigate the misuse of State vehicles and noncompliance with CSCU policies.

6. Institute residency requirement for executives.

The Board of Regents should consider implementing residency requirements for high level staff, e.g. Chancellor, President, and Vice-President. This would be similar to the Executive branch authority to enforce residency requirements per CGS 5-231 for selected classes.

7. Add CSCU to OpenConnecticut.

Section 10a-9b of the Connecticut General Statutes should be expanded to require constituent units of the state system of higher education to submit quarterly, or at a minimum annual, detailed financial and budgetary information to the Office of the State Comptroller when Core-CT is not being fully utilized. This information will be made available through the State's OpenConnecticut website, which will increase transparency and create additional accountability on how state funds are spent.



8. Create uniform training.

CSCU should align its policies and procedures throughout the system to ensure uniformity in how business functions are carried out at the various institutions within the system. This will also help when training personnel as all CSCU personnel would be able to receive the same training.

9. Submit transactions for post-audit by OSC.

CSCU should be subject to a randomized post-audit by OSC, similar to the ones all executive branch state agencies are currently subject to. In order to complete this, OSC will require access to all CSCU transactions.

10. Enforce accountability measures for misuse of P-Cards.

After establishing a system-wide policy for P-Card usage, CSCU should also create and enforce accountability measures for potential P-Card misuse. This may take the form of a point-system with tiered consequences, ultimately resulting in the revocation of one's P-Card.

CONCLUSION

The Comptroller's Office would like to express our appreciation and thanks to CSCU system staff for their voluntary provision of documents, cooperation, and time during this examination.

The Comptroller's Office would also like to note that findings and recommendations are based on a sample of the more than 600,000 documents obtained by the office.



Email Communication from the Chancellor of the CSCU System

From: [announce-campus](#) on behalf of [CSCU-Chancellor](#)
To: [CSCU-Chancellor](#)
Subject: CSCU System Update
Date: Thursday, December 19, 2024 3:36:36 PM
Attachments: [image002.png](#)
[image003.png](#)
[image004.png](#)
[image005.png](#)

Dear CSCU Community:

Yesterday, the Office of the State Comptroller released its findings of its audit of the CSCU system. I want to thank the Office of the State Comptroller for their thorough review of CSCU's policies and p-card and travel records, and for their recommendations for applying tighter controls and improved processes across the entire system.

We are reviewing the recommendations and findings from the Comptroller's Office and are committed to implementing stronger controls, policies, and comprehensive training in pursuit of our collective goals of accountability and transparency across the system and to protect taxpayer dollars and student funds.

The system has begun to take steps in this direction and, over the next 100 days, we will be implementing policies, procedures, and training to improve compliance and reporting.

I look forward to working closely with the Board of Regents to not only adopt these policies but put them into action.

We can and will do better. I will collaborate with our presidents and leadership across the system to model and unify higher standards.

The resulting work will make our system stronger.

Sincerely,
Chancellor Terrence Cheng

Email Communication from the Interim-President of SCSU

From: [announce-campus](#) on behalf of [DWayne Smith](#)
To: [announce-campus@lists.southernct.edu](#)/[announce-campus@lists.southernct.edu](#)
Subject: From the President, re. CSU System Audit
Date: Thursday, December 19, 2024 3:49:41 PM
Attachments: [image001.png](#)

From the **Office of the President** SOUTHERN CONNECTICUT STATE UNIVERSITY

Dear Colleagues,

I am sure by now that many of you are aware of the State Comptroller's audit of the CSU System's p-card and travel policies and practices, which was released Wednesday. The audit provides thoughtful recommendations to improve transparency and accountability on behalf of our scholars and Connecticut taxpayers.

The systemwide standardization of p-card policies and processes will ultimately benefit us all, and we will continue building on these conversations internally to ensure appropriate training and review are applied to the procurement process, as referenced by the Chancellor in his 100-day plan. As the state continues to face fiscal challenges, we are keenly aware that we must take every step to be good stewards of the state's resources.

While the audit largely focuses on our system as a whole, it does make specific reference to Southern, with a focus on p-card transactions from my office. Many of the expenditures relate to my community engagement activities since I was installed as Southern's interim president 18 months ago.

Throughout my 40-year career in various academic and administrative leadership roles, I have always adhered to the vision that public higher education has the power to transform lives. Therefore, as interim president, I have made an intentional effort to be an active and visible presence for Southern in the wider community.

Specifically, a large amount of my time has been spent engaging with a wide range of internal and external stakeholders on behalf of our scholars and our institution – reinforcing that Southern is an economic resource and a crucial engine of workforce development. These meetings have yielded significant support for our scholarship programs, internships, mentoring, and ultimately, enhanced job opportunities for our graduates.

We have talented faculty and staff, who are dedicated every day to building these career pathways, and I am proud to partner with them to establish relationships with those in the wider community who see the importance and value of supporting our hard-working and dedicated scholars.

I remain committed to this ongoing, critical outreach and to our vision of the transformative power of public higher education, for the betterment of our scholars and the extended community. And I welcome the opportunity to increase awareness and transparency around this important work.

Sincerely,

Dr. D



DR. DWAYNE SMITH
Interim President
Southern Connecticut State University

203-392-5250

203-392-5255

DSmith@SouthernCT.edu

501 Crescent Street, EN A211

New Haven, CT 06515

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OPENING MINDS, OPENING DOORS
CONNECTICUT STATE UNIVERSITY AMERICAN ASSOCIATION OF UNIVERSITY PROFESSORS

CSU-AAUP response to the Charter Oak taskforce Report

CSU-AAUP was disappointed to read the “Charter Oak Scaling Taskforce report” of December 2024. Our union objects to the plan for the reasons outlined below. Once again, CSU faculty, CSU students, and all members of the CSCU system are forced to confront another administrative gimmick from the Board of Regents. Apart from being poorly written (it seems AI generated) and poorly conceived (it is contradictory in places), the Charter Oak report is a slap in the face of every serious educator. But most troubling to us is the possibility that the board might be willing to use students as pawns to get back in the good graces of the Governor, the legislature and the Office of Policy Management. The students of Connecticut deserve better.

CSU-AAUP is tired of the accumulation of failure that defines this board – Students First Consolidation, successive contract negotiation battles, CSCU 2030, the Retirement Incentive Program, the ACT framework, tuition hikes, the political fiasco in trying to secure system funding, and now the transformation of Charter Oak.

It is a bad report that reflects a bad idea.

There is no evidence/no policy that CSU-AAUP can point toward that indicates that this board cares about student education. Rebranding a diploma mill does not change its essential nature.

1) The Taskforce is not objective

- The taskforce is composed of people who have **little education experience** in the CSCU system and/or have **conflicts of interest**. If taskforce members are set to benefit from this plan, they are not objective.
- Many members are business people working in **online education and AI**:
 - Samantha Fisher Managing Director, Global Education Practice, **Accenture**
 - “May 20, 2024 – Accenture (NYSE: ACN) has completed the acquisition of **Udacity**, a digital education pioneer with deep expertise in the development and delivery of proprietary technology courses...”
 - Dr. Rick Levin Former CEO **Coursera**, Former President of Yale University
 - The plan includes Coursera Career Academic as a consultant/content provider.
- Others work in **for-profit businesses in technology and healthcare**:
 - Matt McCooe CEO, **Connecticut Innovations**, which is a venture capital entity for biotech and IT.
 - Cynthia Pugliese SVP, Revenue Cycle Services at **Hartford Healthcare**.
 - Bruce Soltys VP of HR and Emerging Talent, **Travelers Insurance**.

- All but one of the faculty/educational experts are **employees of COSC**. The one taskforce member from SCSU, we have heard was not really consulted and does not agree with the report.
 - Ed Klonoski President, Charter Oak State College
 - Dr. Maureen Hogan Professor and Director of Early Childhood Education, Charter Oak State College
 - Dr. Bogdan Zamfir Director of the Center for Educational and Assistive Technology and Adjunct Professor, SCSU
- Interestingly, there are no members of the taskforce who are:
 - CT State or CSU presidents or administrators
 - faculty/staff from a CSU or CT State Community college who teach online courses or who do research in education or educational methods or technology
 - staff from a CSU or CT State who work in instructional technology
 - Unions representatives, faculty or staff – at the CSUs and CT State

CSU-AAUP questions the appropriateness and the self-serving nature of this taskforce.

2) The plan is unrealistic and unsupported

The plan includes many grandiose promises that will probably cost more than the promised savings. The plan itself reads like a thought experiment with few, and very vague, details. It is poorly written and argued; much of it is repetitious and vacuous. It appears that parts of the report were AI generated (according to the Originality.ai AI detection program). The board, and the state, should not spend money on a plan that is based on so little evidence that it is doubtful that it could possibly succeed.

The plan is **more expensive** than the report admits:

- It will cost \$24 million [\$23,976,314] over 5 years vs. \$3.8 million which is the number given (although the reports admits this number excludes scholarship money). Including:
 - \$ 13,488,814 in extra block grant funding, and
 - \$ 10,487,500 in extra money for scholarships.

The plan rests on assertions that are **vague** and for which there is **no proof** that they have worked elsewhere or will work here. The plan claims that COSC will do many new things in next 5 years, and it will do them with **fewer, not more staff**. But the report does not describe which current or future administrators/staff members will initiate, oversee, administer all these initiatives. And most of them require constant updating, not just a one-time change.

It is promised that Charter Oak State College:

1. will become a university by creating a new Education school right away with new programs and courses, and then possibly 3 other schools – Healthcare, Social Work, Data & Technology -- in the future because these also are areas of current workforce needs;
2. will modernize course content and delivery methods of existing courses – becoming the most innovative school with the most up to date courses in fields with market demand;
3. will create and constantly update guides for faculty on how to teach;
4. will create and constantly update guides for students on how to negotiate the school;

5. will include the latest new technology (AI, adaptive learning, multi-lingual learning) in courses, for student services, career counseling, and administration;
6. will establish and maintain partnerships, for example with Coursera (and other online content providers), K-12 institutions, businesses;
7. will administer new scholarship/loan programs;
8. will administer educational apprenticeship programs;
9. will expand K-12 concurrent programs and market them;
10. will become an OPX provider for other CSCU schools, with new courses and delivery methods that are constantly kept up to date;
11. will collaborate with other CSCU schools on hybrid options at times that working students can attend (ex. evenings, weekends);
12. will create new revenue-generating programs (i.e., for credentials);
13. will engage in a new marketing/rebranding campaign directed at all students, and especially non-traditional and underserved students;
14. will create a new “change management” strategy and a new administrative structure.

CSCU-AAUP acknowledges the bold promises that are discussed in the plan, but we live in the real world – a world that is both expensive and complicated. Cost and complexity are two things that are missing from this report.

3) Parts of the plan are very confusing and even contradictory

The report claims that it will establish a last-dollar scholarship program like PACT, but also describes a first-dollar conditional loan that will be forgiven if a student stays in state for 3 years after graduation with interest paid by COSC. Which is it?

It is unclear which students will receive COSC scholarships:

- The “Community College Tuition Match Program” appears to be only for CT State students: it covers “up to 100% of tuition for students transferring from CT State. This alignment with CT State’s free community college program ensures that students have a cost-effective, streamlined pathway to a bachelor’s degree.”
- But it is unclear if this is the same as “The Tuition-Free Bachelor’s Degree pathway.”
- And the plan also claims to be for students who have some college credits but no credential equivalent to an associate’s degree. This, and the description of marketing efforts suggests the expanded COSC will be enrolling new students not previously at CT State, and not previously experienced with online education. But is it not clear if these students will also get scholarships.

It is not clear whether the plan will include a scholarship or a loan program, or both:

- The plan suggest COSC will use a “**last-dollar**” **scholarship** approach like PACT, where students take all financial aid, then get institutional funding, and state scholarship support to cover any remaining tuition costs.
- But in the section on “Incentives for Graduates to Remain in Connecticut,” it states that “The Tuition-Free Bachelor’s Degree program operates as a **conditional loan**....” It explains that “tuition costs are provided upfront to eligible students as a forgivable loan. Graduates who live and work in Connecticut for at least three years following their degree completion will have their loan fully forgiven....” “Graduates unable to meet the residency and employment

requirements may be required to repay the loan....” COSC will cover interest payments while the 3-year service is ongoing, with full payoff only upon completion of 3 years of service in the field in the state of Connecticut.

CSU-AAUP is very unclear about what all this means – scholarships and/or conditional loans -- and about who will administer all these financial transactions, including tracking graduates’ whereabouts for three years. With all the talk about LADDERS in the report, we hope the authors did not fall off one, as there is a fair bit of confusion here.

4) The plan is simplistic

This COSC scaling plan is simplistic because it shows very little understanding of the realities of university administration, training, and education. It ignores several key factors.

A **University** with distinct schools requires more, not fewer, **administrators**. This is not addressed in the report. In fact, once again, it is contradictory; it claims that it will save money on staff with automation, but admits that it will require “hiring more professionals” for support services.

- Most universities have Deans for each school to oversee them, work on assessment, accreditation, and credentialing.
- State certification requirements need to have administrators to keep up with changes required by new state statutes and regulations. For example, the state often mandates that certain subjects be taken by education students (ex. World History, the Holocaust) or a certain number of credits be taken. This requires monitoring and adjusting of programs and curriculum.
- Accrediting agencies also can change their requirements and reporting structures, and this needs regular attention.

Education/nursing/ social work training has special requirements that must be completed face-to-face, not online. This is not addressed in the report.

- Students require practicums and student teaching experiences on the ground in K-12 schools, hospitals, social work agencies as part of the BA degrees at the CSUs. There is no indication in the report how this will be done by COSC. This will require more administrators to establish relationships with schools/agencies, supervise students when in the field, work with cooperating supervisors, assess, and advise students. This also will cost more money if students are to finish a BA without expense in order to pay them for their work in these practicums.
- All these professions have certification examinations that must be taken, for example in education, the Praxis II. The plan does not address how it will assist students in doing this. At the CSUs there already exist on the ground courses designed specifically to prepare students for these exams.
- At the CSU students also must receive recommendation letters from faculty they know before being accepted in these programs, to assess not just their knowledge but their suitability for professions that require a great deal of face-to-face interaction with clients. It is unclear in this plan how an online instructor will have the kind of knowledge to assess whether a student has the appropriate personality to be a teacher of young people, a nurse or social worker.

- The plan also does not address what certainly will be a question about why someone who has little or no in person social interaction with faculty or other students would be appropriate to care for their children or family members in distress.

Retention is a problem in online education, and especially for the new demographic being targeted. This is not seriously addressed in the report – without it, this plan for COSC is destined to fail.

- It is well known that many more online students drop out of courses and school than students in face-to-face education.
- The plan does not appear based on a serious, scholarly understanding of why online students drop out, and also get worse grades, and have lower GPAs. Online education is well-known to only be good for certain students in certain disciplines. A very recent study of a public university concluded “face-to-face (FtF) instruction results in better student performance, such as higher grades and a lower withdrawal rate. Additionally, students with greater exposure to FtF instruction are less likely to repeat courses, more likely to graduate on time, and achieve higher Grade Point Averages (GPA).” This is true for all students “except for Honors and graduate students, where the FtF advantage is either smaller or statistically insignificant.” (see Altindag, S.Filiz, and Tekin 2024).
- A recent literature review on dropout rates concluded that online education is worse for certain demographic groups and in certain fields. It particularly has a negative impact on student engagement, which can lead to students withdrawing from school as well as dropping or failing out of courses. (See Rahmani, Groot, and Rhamani 2024).
- The idea of using Artificial Intelligence as a way to advise, assist, and tutor students does not address the causes of lack of success online, including a sense of social isolation, poor motivation, bad time management when not in a structured environment, lack of connection with faculty members, technology issues.
- COSC appears to be exploiting students by recruiting those destined to fail and making them waste their time on online education because it is free.

CSU-AAUP is taken aback by the lack of seriousness of this plan and its moral opacity in potentially setting up students to fail.

5) The plan is about profit and privatization, not education

The primary goal of the plan is to make money. Nowhere does it explain how scaling Charter Oak will fulfill the mandate of Connecticut’s state statutes to provide excellent education.

In the plan the **profit motive** is primary, not education:

- The new COSC BA programs are designed to **generate income** so that the institution does not have to rely on state money for operations; the state will only pay for student scholarships. This, in essence, makes it a private, rather than state school.
- The goal of increasing enrollments is to make money from tuition because “each additional student brings revenue that contributes to COSC’s financial independence and reduces reliance on state funding.” Educating Connecticut’s residents is secondary.

- That revenue generation is primary also is apparent in “the stretch goal of COSC,” which “is to become an institution that **produces a net profit.**”
- The plan also includes creating **new revenue-generating programs and services** that will serve as “additional sources of revenue outside traditional degree programs.” This makes COSC a “diploma mill” where students pay for a degree without really getting an education.
- Even the plan’s hope for “Enhanced **Retention** and Completion Rates” for students is motivated by profit, not education, because “High retention rates lead to increased tuition revenue ... allowing COSC to... reduce dependence on state funds.”
- Finally, the authors of the report hope that the new COSC “sets a **precedent** for financial independence within public higher education.” In other words, it will encourage all the CSU schools to become private, not public institutions.

The plan also involves **outsourcing**, which is a form of privatization, because state employees are not doing the work of the university.

- The plan’s partnership with Coursera and other online content providers means that the courses offered by school are not all designed or taught by state employees.
- Coursera also will charge money for their services, which means they are outside paid consultants. The state generally has regulations about outside consultants which the report does not mention.

The plan includes COSC becoming an **OPX** for the CSUs and CT State. This model also is a form of privatization.

- COSC as an OPX is about making money because it involves the other state schools paying COSC for courses it designs, rather than relying on their own faculty that they already pay.
- The idea for OPXs originated in the Online Program Management (OPM) model of universities purchasing content and services from outside for-profit companies.
- The OPM model recently has gained a very bad reputation, even with some state legislation restricting it, and many companies going bankrupt because it did not work.
- The OPX (online program experience) model has shorter-term contracts and more limited services, but is it similar. It is untried and expensive, and may fail just as OPMs did.
- This way of making money for COSC will result in the same problems of OPMs. The CSUs and CT State will lose institutional control of curriculum and the ability to assess the quality of their degrees. It also might lead to the abuse of students with aggressive marketing and violation of student data privacy.

Privatization may impact **accreditation**.

- The plan says nothing about accreditation.
- Currently, COSC is accredited by a regional agency. It may not approve this plan.
- Has that agency been contacted about this plan?

This is not what a public institution should do. Public colleges and universities serve the common good, and are not driven by profit motives. CSU-AAUP believes that the CSU system belongs to the people of Connecticut, it is not the plaything or a quick payday for private entities.

6) The plan engenders institutional competition vs. complementarity

This plan will unleash a downward spiral of inter and intra-institutional competition within the CSCU system that will be both wasteful and inefficient. This plan violates the so-called “systemness” of CSCU that Chancellor Cheng speaks about, and sets Charter Oak against the CSUs and CT State College.

The plan **underestimates (i.e., denies) the competition** for enrollment that will occur with the CSUs.

- The option of a “free” alternative to gain a BA within the system without the CSUs losing students is pure folly. Even though the plan claims to be directed at CT State Students who already take all their courses online, the effort to attract thousands more students and to market the COSC BA to under resourced and minority groups will certainly take those students away from the state universities.
- The plan must provide more evidence that free online BA s will not impact enrollments and revenue of the CSUs. We do not believe it.

The plan duplicates programs offered at the CSUs.

- The CSUs already has established programs in these disciplines, many of which have online courses if deemed pedagogically appropriate.
- The CSUs already have hybrid options at times that working students can attend (evenings and weekends) and do not need the assistance of COSC, which does not have experience in hybrid offerings.
- The CSUs have already established (and maintain) partnerships with K-12 institutions and businesses. For COSC to do this is a duplication of efforts.
- The CSUs have many educational apprenticeship programs. Again, COSC will duplicate and compete with them if this plan is approved.
- The CSUs already have K-12 concurrent programs and they can expand them. It is not educationally appropriate for K-12 students to take college courses online. They will be far better served by CSU on-ground taught courses.

CSU-AAUP believes that the Charter Oak plan will unleash a race to the bottom within the CSCU system, injecting destructive competition that is not needed or warranted.

7) The assurance of educational quality is unclear

The **quality of education** that will be offered is unclear in the plan.

- As a fully online, asynchronous college, it is the responsibility of the designers of this scaling plan to prove to the state that this type of education is as “excellent” as traditional university education. This is the mandate of the State Constitution.

The **requirements of the BA programs** that COSC plans to offer are unclear in the plan.

- The plan does not make it clear whether the requirements of the BA programs will be the same as other universities.
 - How many credits will be required?

- How many upper level and lower level courses will be required?
- Will there be a General Education requirement?
- What courses will transfer from other institutions?
- It is unclear if the plan will follow another educational model. It mentions the key competitors Western Governors University and Southern New Hampshire University. Will it copy them? If so, they will have a different type of education than at the CSUs, and the BA degree will not be equivalent.
 - For example, WGU uses a “competency based” model of education, where students don’t get grades in courses, but only pass or fail them. When students pass all their courses, they get their degree with a 3.0 GPA. So, all students graduate with the same GPA. Some students don’t like this:
https://www.reddit.com/r/WGU/comments/1d2zvzt/does_wgus_competencybased_grading_system_annoy/?rdt=54918
- The plan also mentions stackable credentials, but it does not describe how they work and the controversies over them.
 - It does not describe what credentials will be offered, or who decides how they are taken and stacked.
 - For controversy, see: <https://www.aaup.org/article/liberal-education-needs-integration-not-unbundling>
- It is not stated who will decide requirements for a BA. Will this be the same as at the CSUs, where faculty experts do this? If it is not the same, what are the guarantees that the curriculum will be rigorous and appropriate?
- If the BA requirements and course models are not the same as the CSU BAs, the reputation of a COSC BA may be impacted and the success of the plan put at risk.
- Or if the COSC BA requirements are less rigorous, because the institution’s goal is to address workforce shortages quickly and at less cost, then the reputation of the CSUs will suffer. Students and the public will assume that an easier and quicker path to a degree is appropriate and that a CSU BA is unnecessarily difficult.

For CSU-AAUP, these concerns/questions illustrate that educational experts from within the CSCU system were not part of the development of this plan. As such, it needs to be dismissed.

8) The plan is an attack on faculty expertise and working conditions

The plan suggests an entirely **new model of faculty work and compensation**; a model that is not proven to promote educational excellence.

- Within this half-baked plan, the functions of faculty are divided among several different individuals, and it creates another two-tiered model of education:
 - Instead of one professor doing all the key jobs that faculty do, these jobs now are divided among three different groups of people.
 - A few Subject matter experts (SMEs)
 - A few Instructional designers (pedagogy) (IDs)

- Many Instructors, who are part-time, paid per student a lower rate than SMEs, with no benefits or job security.
- These groups have different credentials, working conditions, pay and benefits.
 - The few elites, SMEs and IDs, will have PhDs or other advanced degrees and will be full-time, well paid and with benefits, and may have some job security;
 - The masses of Instructors will be part-time, paid per student a lower rate than SMEs, with no benefits or job security.
- This is harmful for many reasons
 - It exploits faculty workers, which is the goal because the “business model” of COSC rests on lower faculty compensation. That is, not providing a living wage and job security is key to this plan.
 - Most faculty do not have agency or decision-making power at all. The instructors do not decide curriculum or pedagogy, perhaps do not even do the grading (this can be done by AI or a committee as in Coursera). Eventually, they may be unnecessary altogether and AI will assume all their roles.
 - It hurts students, who do not have a close relationship with faculty experts and who are likely to have less faculty attention because the compensation model is more pay for more students and so encourages large class sizes. Instructors will not have the time to give personal attention to many students.

This model of education **does not promote educational excellence.**

- The **separation of research and teaching** creates an inferior education.
 - Lower paid instructors who teach, but do not do research to create courses or knowledge, can’t be as good at teaching critical thinking, analysis, research and writing as those faculty who actually practice those skills as part of their jobs. And these are skills that are crucial to an excellent education and should be taught in all courses that lead to a BA.
- The **separation of course creation and course delivery** is detrimental to education.
 - Creating courses and updating them every semester is essential to good teaching. Knowledge changes constantly, it is essential for all instructors to keep up to date with changes or they cannot convey a real understanding of the fluidity of knowledge or importance of innovation.
 - If the instructor is not designing the course, then courses may not be up-to-date. Most teachers update their courses each time they teach them. But with only a few SMEs or purchased courses this is not possible. Students at COSC may learn out-of-date material.
 - The best practices for student engagement may not be possible in a course that the instructor does not design. Active learning, small group work, immersive games are known to be important in student learning. But this is much more difficult to do in an online course and course creators who are not the instructors may not be aware of how to engage students as well as those who interact with them daily.
- **Innovation** will be discouraged if faculty do not have academic freedom or intellectual property rights.

- There is no mention of guarantees of academic freedom in this plan. If entities other than faculty are determining course content and pedagogy, they may be swayed by outside forces to provide only certain types of courses with certain content because they may not be concerned with academic freedom to innovate and tell the truth.
- In this plan faculty members who are paid to create a course will not own the intellectual property of the course. The institution or outside company owns the rights and can give the course to others to teach as many times as they want.
- There is no incentive to design a course that is creative and cutting edge, if it can be taken by others as their own. This is the same principle that led to copyright protection. They are designed to promote innovation.
- Without **shared governance** the plan does have the benefit of the knowledge and experience of experts.
 - The plan was designed without shared governance, because it was done without real input from faculty/staff/students.
 - The taskforce was created without a call for participants and most likely was hand-picked by the administration.
 - The report was written without faculty input, and much of it was not even written by the taskforce but generated by Artificial Intelligence.

CSU-AAUP regards the Charter Oak plan as an attack on academic workers and students. It is nothing but a corporate dystopia about how to take over public higher education and destroy everything that is good within it.

9) The plan will have wider consequences

The plan diminishes the **reputation** of the teaching profession.

- Granting BAs occurs with courses taught primarily by contracted “instructors.” This Charter Oak plan, therefore, promotes the idea that faculty training and expertise is not necessary in education, and that there is no real need for PhDs and tenure.
- This is an attempt at deskilling that diminishes the reputation of all faculty members in all forms of education, not just higher education.

This plan also will contribute to **societal inequality**.

- The children of the privileged will be able to have a traditional university education where they learn to think critically and get a wide variety of jobs.
- The less fortunate will be taught by machines, or faculty made to act like unthinking machines, and only be given the opportunity to assume certain jobs determined by the state.

For CSU-AAUP, the Charter Oak plan is arrogant, misguided, and dangerous. It ignores the strengths of our system as it ties itself in knots trying to curry favor with the governor. One cannot take education seriously and support such a plan. Our union rejects this report and is prepared to fight it within the system, at the LOB, and in the public. It is bad for our members, it is bad for our students, and it is bad for Connecticut.

CharterOak
STATE COLLEGE
A Higher Degree of Online Learning

Scaling Taskforce Report



Executive Summary

Charter Oak State College (COSC) aims to become Connecticut's premier online workforce college, as it scales up affordable pathways for Connecticut's Workforce and increases its enrollment from 2,000 to 6,000 students over the next five years (2,400 in Fall 2025, 3,100 in Fall 2026, 4,000 in Fall 2027, 5,000 in Fall 2028, and 6,000 in Fall 2029). Reaching this enrollment milestone will maximize economies of scale and allow COSC to transform 100% of its current direct state support into student scholarships.

These scholarships will allow Charter Oak to redefine affordable higher education in Connecticut through a bold new initiative: the Tuition-Free Bachelor's Degree. This pathway, targeted only to Connecticut residents, focuses on high-demand fields identified by the Governor's Workforce Council: Healthcare, Education, Social Work, and Data & Technology. Graduates of the Tuition-Free Bachelor's Degree program will be required to reside in Connecticut for at least three years post-graduation, aligning with the state's workforce retention goals.

Charter Oak is uniquely positioned as Connecticut's only fully online public college; COSC is accessible statewide, reaching students in every corner of Connecticut. COSC's flexibility allows it to respond rapidly to workforce needs, developing programs in high-demand fields that align with state priorities. Already offering the most affordable bachelor's degree in Connecticut, COSC can scale further without compromising affordability due to its innovative faculty and intellectual property model, recently enshrined in a collective bargaining agreement.

COSC will drive enrollment by building on current strengths. First, it will expand its partnership with CT State Community College and its 7500+ fully online students through the Leveraging Academic Degrees to Drive Employment Readiness and Success (LADDERS) initiative. This will establish a stackable, seamless 2+2 transfer partnership, incorporating concurrent enrollment and creating wage growth opportunities.

Second, COSC will create a School of Education that expands on its success as the premier online educator for Early Childhood Education, expanding to other education programs to address Connecticut's critical need for skilled educators in a sought after and flexible format that caters to working residents.

Thirdly, COSC will increase its competitiveness. Charter Oak provides the most cost effective, fully online and workforce ready programs for Connecticut residents, but currently, COSC lacks strong brand recognition and marketing has been underinvested. COSC will explore rebranding options and pursue targeted initiatives to expand into new student markets, focusing on growth opportunities in groups such as Some College, No Credential (SCNC) individuals, K-12 students (dual enrollment), and Multilingual Learners (which can be cost-effectively enabled with technology). COSC will explore the possibility of

adopting university status and the possibility of becoming a Hispanic Serving Institution.

All the initiatives listed above are expected to have minimal to no impact on enrollment at the CSUs within the system. For instance, the LADDERS initiative targets CT State students who are exclusively online and therefore more likely to seek a fully online, asynchronous bachelor's degree for transfer. The new programs proposed through the School of Education focus on addressing workforce shortages and offering programs that are not currently available in a fully online, asynchronous format.

To support the CSUs and CT State, COSC can collaborate with other CSCU institutions as an Online Program Experience (OPX) provider. This voluntary partnership would assist CSCU institutions in developing, delivering, and expanding online programs and services. COSC plans to create an OPX rate card and make these services available on a voluntary basis to CSCU institutions.

In addition, COSC will reduce and eliminate its programs that don't offer strong workforce pathways or have clear student demand. Our goal is to serve our students best and we do that by giving them strong career paths.

To support this growth, COSC will make strategic investments in proven best in class technology tools such as adaptive learning content in addition to innovative technology, particularly artificial intelligence. This will be used to enhance the student experience, streamline operations, and maximize economies of scale. These investments will reduce the need for proportional staffing increases as enrollment grows, creating a substantial return on investment by the end of the five-year plan.

The plan outlined here will establish COSC as the top choice for online learners in Connecticut, prioritize student success through the bold new Tuition-Free Bachelor's Degree, strengthen existing areas of expertise, enhance its brand, and expand into underrepresented populations. This roadmap paves the way for COSC to educate thousands more Connecticut employees each year and ultimately create dozens of jobs at COSC. Students that otherwise may leave the state or pay tuition dollars out of state, will now stay in Connecticut which benefits both the college and the state by producing a skilled, career-ready workforce. With a focused temporary investment of \$3.8M over 2 years above current support levels (in addition to establishing investments in tuition-free bachelor's and dual credit), COSC can accelerate its transition to financial self-sufficiency, eliminating the need for state funding while expanding its capacity to serve Connecticut.

Scaling Taskforce Members

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Dr. Bogdan Zamfir

Director of the Center for Educational and Assistive Technology and Adjunct Professor, SCSU

Statement of Problem

Scaling Charter Oak State College (COSC) seeks to address two major challenges facing Connecticut. First, the state experiences a net loss of online enrollments, as residents increasingly choose out-of-state institutions, resulting in the export of above-market tuition revenues that fund the profit margins of external entities. For instance, in Connecticut, online bachelor’s degree completions (a lagging indicator of student enrollment) grew from 1,950 in 2017 to 2,300 in 2022—an 18% increase. However, during this same period, COSC’s enrollment remained flat, meaning that this growth was captured by other online competitors, causing those tuition dollars to flow outside the CSU system and to out-of-state institutions.

Second, the state faces a workforce shortage, with over 90,000 unfilled jobs according to the Connecticut Department of Labor. By aligning growth strategies and initiatives with programs targeting workforce shortage areas, COSC can help close this employment gap in key sectors such as healthcare, business, education, and technology. This effort not only addresses workforce needs but also has the potential to boost future state tax revenues. The data referenced below is sourced from the NC-SARA Data Dashboard (Fall 2023 enrollment numbers).

CT Online Students Attending Out of State (Top5)		CT Students Attending In-State (Top 5)	
INSTITUTION	NUMBER	INSTITUTION	NUMBER
SNHU	3,786	CT State	7,501
WGU	1,206	Post	1,855
Penn Foster	813	Goodwin	1,626
U of Phoenix	689	COSC	1,560
Capella	650	UCONN	1,084
All Out of State Colleges	20,352	All CT Colleges	18,832

Scale Up Plan

Charter Oak State College (COSC) has developed a multifaceted Scale Up Plan designed to grow enrollment from 2,000 to 6,000 students over the next five years. This strategic approach includes the Tuition-Free Bachelor’s Degree, LADDERS, academic reorganization starting with the School of Education, technology investments with a focus on AI, a focused branding strategy, and exploring new markets. This plan will strengthen COSC’s position as Connecticut’s premier online workforce college, offering high-quality, affordable education to meet the needs of today’s students and employers.

STUDENT GROWTH GOAL TARGETS BY YEAR

Achieving 6,000 enrollments within five years requires a calculated and phased expansion across COSC’s operations, with each area of the Scale Up Plan playing a critical role. This growth goal is central to ensuring COSC can increase access to education for Connecticut residents while meeting workforce demands and achieving operational efficiencies. By leveraging partnerships, introducing in-demand programs, reducing student debt, adopting advanced technology, and increasing brand visibility, COSC will create a streamlined pathway to degree completion for students across the state. The targeted

headcount for each year to measure progress is: Fall 2025 - 2,400, Fall 2026 - 3,100, Fall 2027 - 4,000, Fall 2028 - 5,000, Fall 2029 - 6,000.

TUITION-FREE BACHELOR'S DEGREE PATHWAY

The Tuition-Free Bachelor's Degree pathway is a cornerstone of COSC's mission to make higher education accessible and financially manageable for Connecticut residents. By utilizing a last-dollar scholarship model, the program ensures students can complete their degrees without tuition expenses, reducing financial barriers and aligning with the state's workforce retention goals.

- **Program Framework and Eligibility:** The Tuition-Free Bachelor's Degree pathway is available to Connecticut residents who begin their educational journey at one of Connecticut State Community Colleges (CT State) through the state's free community college program or who have some college credits but no credential equivalent to an associate's degree and want to complete a bachelor's degree in an in-demand workforce program. This pathway, targeted to Connecticut residents, focuses on high-demand fields identified by the Governor's Workforce Council, such as Healthcare, Education, Social Work, and Data & Technology. Graduates of the Tuition-Free Bachelor's Degree program will be required to reside in Connecticut for at least three years post-graduation, aligning with the state's workforce retention goals.
- **Financial Model and Last-Dollar Approach:** COSC will use a "last-dollar" scholarship approach, leveraging institutional funding alongside state scholarship support to cover any remaining tuition costs after financial aid is applied. By acting as a financial safety net, the last-dollar scholarship model ensures that any financial gaps are covered, reducing the need for student loans.
- **Community College Tuition Match Program:** COSC will fund its Community College Tuition Match Program, covering up to 100% of tuition for students transferring from CT State. This alignment with CT State's free community college program ensures that students have a cost-effective, streamlined pathway to a bachelor's degree and mitigates some of the cost needed from the state budget.
- **Incentives for Graduates to Remain in Connecticut:** As part of this pathway, COSC will implement incentives to encourage graduates to stay and work in Connecticut. The Tuition-Free Bachelor's Degree program operates as a conditional loan designed to support student success while aligning with Connecticut's workforce retention goals. Under this model, tuition costs are provided upfront to eligible students as a forgivable loan. Graduates who live and work in Connecticut for at least three years following their degree completion will have their loan fully forgiven, converting the support into a true tuition-free benefit. This approach ensures that state resources directly contribute to retaining skilled talent within Connecticut, while providing students with a financially accessible pathway to achieving their educational goals. Graduates unable to meet the residency and employment requirements may be required to repay the loan, reinforcing the program's alignment with state economic development objectives.
- **COSC will cover interest payments** while the 3-year service is ongoing, with full payoff only upon completion of 3 years of service in the field in the state of Connecticut.
- **Impact on Accessibility and Enrollment:** This pathway significantly broadens COSC's appeal to underserved populations, including first-generation college students, working professionals, and residents from low-income backgrounds. By eliminating financial barriers, COSC aims to expand its reach within these demographics, contributing to the state's educational attainment rates and supporting inclusive workforce readiness.
- **Mitigating Impact on State Universities:** COSC will position the Tuition-Free Bachelor's Degree pathway as an online-exclusive option, complementing rather than competing with traditional on-ground offerings at the state universities. The program will be marketed to students who are predisposed to pursue their education online, ensuring it does not detract from the enrollment pipelines of the state universities.

Tuition-Free Bachelor's Degree	Enrollment Gain FY26 (AY25-26)	Enrollment Gain FY27 (AY26-27)	Enrollment Gain FY28 (AY27-28)	Enrollment Gain FY29 (AY28-29)	Enrollment Gain FY30 (AY29-30)
	0	450	900	1400	1900
	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment
	\$0	\$1,000,000	\$2,000,000	\$3,000,000	\$4,000,000
	Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
	N/A	State Scholarship (PACT+)	State Scholarship (PACT+)	State Scholarship (PACT+)	State Scholarship (PACT+)

FINANCIAL INDEPENDENCE FROM STATE SUPPORT

Achieving zero-dollar state support within five years is a bold financial objective that underscores COSC's commitment to operational sustainability and fiscal responsibility.

- **Enrollment Growth as a Revenue Strategy:** COSC's targeted enrollment growth from 2,000 to 6,000 students will create economies of scale, allowing the institution to generate significant revenue from tuition without compromising affordability. Each additional student brings revenue that contributes to COSC's financial independence and reduces reliance on state funding.
- **Cost-Saving Measures and Operational Efficiencies:** COSC will implement a series of cost-saving measures to optimize operations while maintaining its commitment to affordability and quality. These efforts will include streamlined administrative processes, automation of high-volume transactional tasks, and renegotiated vendor contracts. By reducing operational inefficiencies, COSC can reallocate savings to high-impact student services and institutional growth, ensuring resources are used where they are needed most. For example, COSC will continue to operate with a single bursar, a single Director of Financial Aid, and a single Provost, among other key leadership roles. This centralized and efficient model significantly lowers the cost per full-time equivalent (FTE) student compared to institutions with larger and more distributed administrative structures.
- **Enhanced Retention and Completion Rates:** By investing in student support services that enhance retention and degree completion rates, COSC will reduce the costs associated with student attrition. High retention rates lead to increased tuition revenue per student cohort, allowing COSC to stabilize its financial model and reduce dependence on state funds.
- **Revenue-Generating Programs and Services:** COSC will develop new revenue streams, including non-credit workforce training programs, professional development offerings, and certificate programs aligned with high-demand skills. These programs will target working professionals and employers, creating additional sources of revenue outside traditional degree programs.

LADDERS Pathway with CT State Community College

CT State Community College currently has over 7,500+ exclusively online students in associate degree programs, making them the largest online institution in the state and the single largest pipeline into online bachelor's degrees. Charter Oak recognizes that CT State's 7,500+ online students often encounter fragmented course availability, lack of standardization, and scheduling challenges. The Leveraging Academic Degrees to Drive Employment Readiness and Success (LADDERS) Pathway is an essential part of COSC's growth strategy, creating clear pathways from CT State associate degrees to COSC bachelor's degrees. This proactive approach will ensure CT State students understand their options early, facilitating smoother transitions and higher completion rates.

- **Targeted Communication and Student Outreach:** COSC and CT State will implement a collaborative communication strategy to introduce students to the LADDERS pathway while enrolled at CT State. Communication will focus on the benefits of seamless transfer and Tuition-Free options. Using text, email, and virtual open houses, COSC will provide CT State students with tailored information about COSC's degree completion programs.
- **Concurrent Enrollment and 2+2 Pathways:** COSC will expand its concurrent enrollment options, allowing CT State students to begin taking COSC courses before completing their associate degrees in targeted degrees. This model accelerates students' progress toward a bachelor's degree, enabling earlier completion and reducing overall education costs.
- **Community College Tuition Match Program:** COSC will support CT State students by covering tuition gaps through its Community College Tuition Match Program. This program not only makes bachelor's degree completion more affordable but also aligns with the Tuition-Free Bachelor's Degree pathway, reinforcing COSC's commitment to accessibility.
- **Employer Partnerships for Workforce-Ready Graduates:** COSC will work with employers in Connecticut to promote the LADDERS pathway as a talent pipeline for high-demand fields.

LADDERS will help mitigate the loss of CT State students that transfer to institutions outside of CT and the CScU system.

CT State Students that Transfer	2012	2018	2019	2020	2021	2022
Transferred to CCSU	10%	12%	13%	13%	15%	16%
Transferred to WCSU	3%	3%	4%	4%	4%	4%
Transferred to SCSU	6%	9%	10%	10%	10%	11%
Transferred to ECSU	3%	3%	4%	4%	4%	4%
Transferred to COSC	4%	5%	5%	6%	6%	5%
Transferred to UConn	7%	9%	10%	11%	13%	14%
Transferred to Other in State College	24%	21%	19%	17%	17%	17%
Transferred to Out of State College	43%	38%	35%	36%	32%	30%

LADDERS	Enrollment Gain FY26 (AY25-26)	Enrollment Gain FY27 (AY26-27)	Enrollment Gain FY28 (AY27-28)	Enrollment Gain FY29 (AY28-29)	Enrollment Gain FY30 (AY29-30)
	75	150	250	400	500
	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment
	\$200,000	\$200,000	\$200,000	\$200,000	\$300,000
	Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
	State Baseline Increase (temp)	State Baseline Increase (temp)	COSC Absorbs	COSC Absorbs	COSC Absorbs

Programmatic Enhancements: Launching the School of Education

COSC will begin reorganizing the academic structure to look like an institution of 6,000+. The School of Education will serve as COSC's first signature programmatic enhancement, addressing Connecticut's critical need for skilled educators, especially in early childhood education. The proposed School of Education leverages COSC's low-cost, high-quality delivery model to meet urgent demands for skilled

educators. With a focus on early childhood, paraprofessional, and teacher certification pathways, this initiative ensures accessibility and affordability while addressing workforce gaps. State investment in these programs aligns with Connecticut's goals to expand the educator pipeline.

- **Early Childhood Education and Paraprofessional Training:** Recognizing the growing demand for educators, COSC will develop pathways in early childhood education and paraprofessional training. These programs will prepare students for immediate employment while also providing pathways to advanced certifications and licensure.
- **Apprenticeship Pathways to Teacher Certification:** COSC will create an apprenticeship pathway that enables paraprofessionals to advance to full teacher certification, filling gaps in the education workforce. This approach aligns with state workforce needs and provides students with a structured, affordable route to teaching careers.
- **Partnerships with School Districts and Educational Organizations:** COSC will collaborate with school districts across Connecticut to recruit students into education pathways. By offering a pipeline of paraprofessionals and certified teachers, COSC will strengthen Connecticut's education workforce while creating enrollment growth.

School of Education	Enrollment Gain FY26 (AY25-26)	Enrollment Gain FY27 (AY26-27)	Enrollment Gain FY28 (AY27-28)	Enrollment Gain FY29 (AY28-29)	Enrollment Gain FY30 (AY29-30)
	100	150	250	350	400
	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment
	\$300,000	\$400,000	\$500,000	\$500,000	\$500,000
	Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
	State Baseline Increase (temp)	State Baseline Increase (temp)	COSC Absorbs	COSC Absorbs	COSC Absorbs

Technology Investments: AI-Driven Support Services

COSC will optimize existing technology platforms to enhance student outcomes and operational efficiency. Leveraging tools such as AI-supported multilingual learning, Coursera Course Builder, and adaptive learning content, COSC ensures that investments directly improve scalability and align with workforce needs without duplicating existing resources.

- **AI Tutoring, Advising, and Accessibility Tools:** COSC will implement AI-based support services to assist students academically and administratively. These services will include virtual tutoring, AI-powered academic advising, and accessibility tools for multilingual learners and students with disabilities, creating an inclusive, supportive environment.
- **AI-Enhanced Career Coaching:** AI-driven career coaching will provide students with tailored guidance on internships, job placement, and skill development. This technology will enable COSC to support students' career readiness efficiently, reinforcing COSC's role as a career-aligned educational provider.
- **Automating Administrative Processes:** To improve operational efficiency, COSC will automate high-volume tasks like registration, financial aid inquiries, and appointment scheduling. Automation will reduce staff workloads and allow them to focus on high-touch, personalized services.
- **In addition to AI, COSC will strategically invest in best-in-class technology.** For example, making investments with Coursera and/or adaptive learning content will help us provide this industry-driven curriculum in a number of courses to ensure graduates are best prepared for the workforce.

AI Investments (Multi-Language Learners)	Enrollment Gain FY26 (AY25-26)	Enrollment Gain FY27 (AY26-27)	Enrollment Gain FY28 (AY27-28)	Enrollment Gain FY29 (AY28-29)	Enrollment Gain FY30 (AY29-30)
and increased efficiency operations)	0	0	100	250	450
	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment
	\$500,000	\$1,500,000	\$500,000	\$500,000	\$500,000
	Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
	State Baseline Increase (temp)	State Baseline Increase (temp)	COSC Absorbs	COSC Absorbs	COSC Absorbs

Rebranding Charter Oak State College

Charter Oak will explore rebranding options to better align with its expanded mission and offerings. This effort will focus on positioning COSC as Connecticut's premier online workforce college while fostering collaboration within the CSCU system. The rebranding strategy will emphasize inclusivity and affordability, ensuring alignment with statewide educational goals.

- **Brand Study:** COSC will conduct a brand study reflecting its expanded role and comprehensive program offerings. The brand would look to position COSC as Connecticut's leading online workforce institution.
- **Website and Social Media Revamp:** COSC will redesign its website and social media platforms to attract prospective students. By featuring video content, student testimonials, and interactive elements, COSC will create an engaging digital presence that resonates with modern learners.
- **Engaging Working Professionals:** COSC will focus its outreach on working professionals without a bachelor's degree, highlighting COSC's affordability, flexible course options, and career-aligned programs.

Opportunities for Special Population Expansion

To drive enrollment and meet Connecticut's workforce needs, Charter Oak State College (COSC) can explore new opportunities by expanding access to underserved populations. These targeted expansion areas align with COSC's mission to provide affordable, accessible education for all Connecticut residents, including those who face unique barriers to higher education. Each group represents a potential growth area for COSC, while also strengthening the state's workforce pipeline.

TARGETED EXPANSION AREAS: STRATEGIES FOR REACHING SPECIFIC GROUPS

1. Some College, No Credential (SCNC) An estimated 40 million Americans have some college education but no degree, including thousands in Connecticut. COSC can collaborate with educational partners, specializing in supporting students who have "stopped out" of college. By identifying, recruiting, advising, and registering students who left college before completion, COSC can offer these individuals a renewed pathway to finish their degrees, potentially increasing state credential attainment and workforce readiness.

Some College, No Credential (SCNC)	Enrollment Gain FY26 (AY25-26)	Enrollment Gain FY27 (AY26-27)	Enrollment Gain FY28 (AY27-28)	Enrollment Gain FY29 (AY28-29)	Enrollment Gain FY30 (AY29-30)
	200	300	400	400	500
	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment
	\$300,000	\$400,000	\$400,000	\$400,000	\$500,000
	Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
	State Baseline Increase (temp)	State Baseline Increase (temp)	COSC Absorbs	COSC Absorbs	COSC Absorbs

2. K-12 Students Connecticut is quickly falling behind the region and the rest of the country regarding students obtaining opportunities to achieve college credit while enrolled in high school. For example, according to the National Center for Education Statistics (NCES, 2020), the Northeast region ranks last in the country for dual enrollment opportunities funded by the school, district, or state (60.6%). The West stands at 83.5%, the South at 79.4%, and the Midwest is at 79.1%. Within the Northeast region, Rhode Island offers state funding for tuition and fees for up to 8 credits per semester and Maine offers state funding for up to 12 credits per semester as two examples. According to the Education Commission of the States (ECS) 2022 analysis, there are currently 27 online dual enrollment/early college programs across the country. Online early college courses are an excellent choice for high school students who want to start college now without traveling to a physical campus for class. COSC has an opportunity to reach students earlier in their educational journey by offering dual credit and online early college programs for high school students. These initiatives allow students to earn college credits while still in high school, introducing them to COSC and setting them up for success in higher education. This strategy not only builds COSC's brand awareness among younger generations but also provides a cost-effective head start on college for Connecticut families. COSC acknowledges the challenges of scaling early college and dual enrollment programs but remains committed to pursuing these initiatives in alignment with state priorities. By working collaboratively with K-12 partners, COSC will explore sustainable models that enhance access while minimizing financial risks.

Dual Credit w/ K-12 &	Enrollment Gain FY26 (AY25-26)	Enrollment Gain FY27 (AY26-27)	Enrollment Gain FY28 (AY27-28)	Enrollment Gain FY29 (AY28-29)	Enrollment Gain FY30 (AY29-30)
Online Early College	25	50	100	200	250
	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment	Cost/ Investment
	\$80,000	\$37,500	\$75,000	\$150,000	\$225,000
	Funding Source	Funding Source	Funding Source	Funding Source	Funding Source
	OHE Grant	State Scholarship (Dual Credit)	State Scholarship (Dual Credit)	State Scholarship (Dual Credit)	State Scholarship (Dual Credit)

3. Multilingual Learners The population of Multilingual Learners in the U.S. has grown significantly, with 10.6% of public school students identified as multilingual (otherwise known as English Language learners or ELL) in 2021. Multilingual students face unique barriers in accessing higher education, with only 19% enrolling in four-year colleges within two years of high school graduation, compared to 45% of native English speakers. Charter Oak State College recognizes the strengths and readiness of our diverse student body, including Multilingual Learners who bring valuable language skills and global perspectives to the classroom. These students, whose native language is not English, possess the proficiency and adaptability to successfully complete college-level coursework in English. By leveraging advanced technology and a supportive learning environment, COSC enables Multilingual Learners to further

enhance their academic English skills, supporting them in reaching their full potential and contributing to Connecticut's workforce with their bilingual capabilities.

Value Proposition

Charter Oak State College (COSC) stands as a premier educational institution, offering significant benefits to the state of Connecticut, as well as to students, employees, and the college's overall financial health. COSC's unique position as a top-rated public online college highlights its role in contributing to the economic and educational fabric of the state while delivering exceptional value and outcomes to its graduates.

Benefits to the State of Connecticut

Charter Oak has distinguished itself as Connecticut's top public online college, a position cemented by Forbes' America's Top Colleges ranking, which considered metrics such as return on investment, student debt levels, and graduate outcomes. COSC's high ranking underscores its commitment to educational excellence and financial accessibility. By leading in retention, graduation rates, post-graduation wages, and low student debt, COSC has achieved the highest ranking within the Connecticut State Colleges and Universities (CSCU) system, making it a trusted public option for Connecticut residents.

As Connecticut's most affordable path to a bachelor's degree, COSC combines low tuition with strong financial returns. According to the College Scorecard, COSC graduates enjoy some of the highest median earnings in the state, demonstrating a clear alignment with workforce needs and career growth. This strong return on investment makes COSC an invaluable asset to the state, fostering an educated, skilled, and financially empowered workforce.

Benefits to the CSCU System

Charter Oak State College (COSC) is uniquely positioned to serve as an Online Program Experience (OPX) provider for the Connecticut State Colleges and Universities (CSCU) system, leveraging its expertise in online education to create a shared resource model that benefits all six institutions. COSC proposes a voluntary pilot OPX model, starting with targeted collaborations between individual CSCU institutions. This measured approach will demonstrate the feasibility and benefits of shared online resources, providing a foundation for potential system-wide implementation.

By integrating advanced technology such as Coursera content and AI-driven tools, COSC can efficiently curate online courses that align with industry standards and student needs. This approach not only streamlines the course development process but also ensures high-quality content that adheres to Universal Design for Learning (UDL) principles and full ADA compliance, making education more accessible to a diverse range of learners.

Through this OPX initiative, COSC can develop, and license standardized, high-quality courses for use across the CSCU system. COSC's unique intellectual property model allows the college to license professionally developed courses. For instance, a single professionally designed English 101 course could replace the need for six different versions, reducing duplication of effort and creating economies

of scale. Expert instructional designers and subject matter experts at COSC ensure that the content is pedagogically sound and meets online best practices, providing a consistent and engaging learning experience for students. This shared approach also alleviates the human resource burden on individual institutions, allowing faculty and staff to focus on other priorities such as student support and program innovation.

This initiative can support Connecticut State Universities (CSUs) in developing online courses and programs that go beyond what COSC offers. On-ground bachelor's degree completions declined from 25,600 in 2017 to 25,000 in 2022—a 2.4% decrease—and this trend is expected to accelerate as post-pandemic data is reported. In contrast, online completions grew from 1,950 in 2017 to 2,300 in 2022, reflecting an 18% increase. This shift was even more pronounced at the graduate level, where online master's degree completions surged from 1,430 in 2017 to 3,060 in 2022, an increase of 114%. As CSUs expand their own online offerings, particularly at the graduate level, COSC can provide valuable assistance to help them retain tuition revenue and market share, preventing further losses to out-of-state institutions.

The OPX model enhances operational efficiency while promoting equity and consistency across CSCU institutions. It supports the system's mission to deliver accessible, high-quality education while reducing costs and resource demands. By centralizing content creation and leveraging technological advancements, COSC positions itself as a strategic partner to CSCU, fostering collaboration and driving innovation in online education. This initiative exemplifies how shared resources can transform challenges into opportunities, creating a sustainable framework for success across the system.

COSC Scaling and Connection to NCHEMS Report

Aligning with recommendations from the NCHEMS report, Charter Oak proposes linking state support to specific, measurable outcomes. This approach ensures state investments yield tangible benefits, such as increased credential attainment in workforce shortage areas, higher graduate retention within Connecticut, and enhanced economic contributions from skilled professionals. These metrics, in tandem with APT, will provide a transparent framework for evaluating the success of the Tuition-Free Bachelor's Degree and other state-supported initiatives.

Charter Oak State College (COSC) is uniquely positioned within the Connecticut State Colleges and Universities (CSCU) system to pilot innovative approaches that align with state workforce priorities and enhance student outcomes. The NCHEMS report underscores the importance of leveraging institutions like Charter Oak to test scalable innovations in educational delivery. As Connecticut faces demographic challenges and evolving workforce needs, COSC can act as an incubator for cutting-edge solutions, enabling the state to maximize its investment in higher education.

The NCHEMS report highlights the need for systemic collaboration and data-driven decision-making. COSC's emphasis on technology-enabled education allows it to serve as a model for integrating advanced tools, such as artificial intelligence, into academic advising, career counseling, and course delivery. These tools can enhance student engagement, improve retention, and streamline pathways to graduation.

As part of the system, Charter Oak can partner with other CSCU institutions to offer hybrid programs, evening courses, and weekend schedules that complement the in-person offerings of community colleges and state universities. Such collaboration can help address longstanding challenges, like the difficulty CT State students face in finding required courses online or at convenient times, as noted in the December meeting discussions.

Impact on Employees, Students, and Financial Stability

COSC offers a compelling value to its stakeholders by incorporating stackable credentials into its degree programs, allowing students to earn industry-recognized certifications while progressing toward their degrees. This model not only enhances employability but also ensures that students can build valuable skills incrementally, maximizing their career opportunities at each stage of their educational journey.

In addition, COSC's partnership with the Coursera Career Academy – one of only two such partnerships in Connecticut – provides faculty and students with access to leading industry content from across various fields. This collaboration enriches COSC's curriculum with cutting-edge knowledge and hands-on learning experiences, equipping students with the competencies required in today's fast-evolving job market.

Through these initiatives, COSC continuously bolsters its financial stability while delivering value to the state, supporting workforce development, and preparing Connecticut's working professionals to excel in their careers.

Competitive Landscape

Charter Oak State College (COSC), as Connecticut's fully online public institution within the Connecticut State College and University (CSCU) system, operates in a highly competitive online education environment. While national institutions such as Southern New Hampshire University (SNHU) and Western Governors University (WGU) dominate the market with aggressive marketing and expansive reach, COSC's strategic efforts focus solely on serving Connecticut residents. This targeted, localized approach distinguishes COSC from larger, nationally focused competitors.

Unlike SNHU, which added 25,000 students in the past year alone, COSC aims to grow its enrollment by 4,000 students over the next five years—a sustainable, incremental expansion that prioritizes quality, accessibility, and alignment with Connecticut's workforce needs. COSC is not seeking to compete on a national scale but rather to meet the specific educational and economic priorities of Connecticut by retaining students who might otherwise enroll in out-of-state institutions.

COSC also distinguishes itself from private institutions within Connecticut, such as Post University and Goodwin University, through its public institution status and mission-driven focus. As the state's most affordable pathway to a bachelor's degree, COSC aligns its programs with Connecticut's high-demand workforce areas, such as healthcare, education, social work, and technology. This approach ensures that COSC remains both accessible and relevant to the needs of its communities.

By leveraging its position within the CSCU system, COSC can also offer benefits that private competitors cannot, such as partnerships with CT State Community Colleges through initiatives like LADDERS. These pathways provide seamless, low-cost options for students to complete their bachelor's degrees while remaining connected to local opportunities.

COSC's deliberate growth strategy is tailored to address Connecticut's unique challenges, including retaining students who are inclined to pursue online degrees. Rather than emulating the broad national appeal of institutions like SNHU or WGU, COSC focuses on creating scalable, innovative solutions to meet the state's workforce demands while maintaining a manageable and mission-aligned enrollment trajectory. This strategy ensures that COSC remains a trusted educational partner for Connecticut residents and a vital contributor to the state's economic future..

Landscape of COSC: Current Position and Strengths

Charter Oak State College has established itself as Connecticut's top-rated public online college for adult learners, as recognized by Forbes. COSC's asynchronous online model serves a predominantly non-traditional, working student body with an average age of 37, enabling the flexibility that adult learners often require. COSC's low-cost tuition positions it as the most affordable bachelor's degree option in Connecticut, with graduates demonstrating high median earnings, according to the College Scorecard.

COSC also maintains one of the lowest student loan default rates in the state, significantly below the national average and much lower than many of its competitors, particularly private institutions. This indicator of financial stability for graduates underscores COSC's commitment to affordability and responsible borrowing, which is a key advantage over other institutions in Connecticut offering online programs.

Online Competitors: Competitive Landscape Overview

Despite its strengths, COSC operates in a highly competitive online education market with both public and private institutions offering similar programs nationwide. In the competitive landscape of online education, Charter Oak State College (COSC) distinguishes itself through its public institution status, affordability, and alignment with Connecticut's workforce needs. While COSC faces competition from both regional and national institutions, its unique offerings and strategic initiatives provide a competitive edge.

Post University offers a range of online undergraduate and graduate programs targeting adult learners. However, its student loan default rates exceed the national average, indicating potential financial challenges for its graduates. Additionally, as a private institution, Post University's tuition rates are higher than those of public institutions like COSC, potentially leading to greater student debt.

Goodwin University provides online programs in fields such as nursing, business, and manufacturing. Similar to Post University, Goodwin's student loan default rates are above the national average, suggesting financial difficulties for some graduates. The higher tuition costs associated with private education at Goodwin may contribute to increased financial burdens for students.

Thomas Edison State University (TESU) is a public institution in New Jersey offering online programs aimed at adult learners. While TESU shares similarities with COSC in serving non-traditional students, COSC's focus on Connecticut's workforce needs and its partnerships with local community colleges provide a tailored approach for state residents. Additionally, COSC's lower tuition rates offer a more affordable option compared to TESU.

Excelsior University is a private, nonprofit institution based in New York, specializing in online education for adult learners. Excelsior's tuition rates are higher than those of public institutions like COSC, potentially leading to greater student debt. Furthermore, as an out-of-state institution, Excelsior may not offer the same level of alignment with Connecticut's specific workforce needs as COSC.

Southern New Hampshire University (SNHU) is a private institution known for its extensive online programs and aggressive national marketing campaigns. SNHU's tuition rates are higher than those of public institutions, which can result in increased student debt. Additionally, SNHU's broad focus may not provide the same level of alignment with Connecticut's workforce needs as COSC's targeted programs.

IN CONTRAST, COSC's public institution status allows it to offer lower tuition rates, resulting in a student loan default rate significantly below the national average. COSC's strategic partnerships with Connecticut State Community College and its focus on stackable credentials provide clear, affordable pathways for students to advance their education and careers within the state. These factors position COSC as a compelling choice for Connecticut residents seeking affordable, flexible, and career-aligned education.

COSC's Competitive Edge

Charter Oak State College's competitive edge lies in its mission-focused approach to serve Connecticut's working professionals through affordable, stackable, and career-aligned education. With low tuition costs, flexible online courses, and a curriculum aligned with state workforce needs, COSC is well-positioned to cater to adult learners seeking to improve their skills and earnings potential without accumulating excessive debt.

COSC's Tuition Match partnership with CT State Community College strengthens its market position by providing a highly affordable option for students, reducing educational costs and time to degree completion with our generous transfer policy. This pathway also facilitates wage growth at each stage, setting COSC apart as a practical choice for those looking to advance within their careers.

Furthermore, COSC's brand study initiative, as outlined in its strategic plan, is a timely effort to increase recognition within Connecticut and beyond. By aligning its brand more closely with its role as Connecticut's premier online workforce college, COSC can differentiate itself from national competitors and establish a more prominent identity within the CSCU system and the broader online education market.

CHALLENGES

While Charter Oak State College (COSC) embarks on the "Scale Up" growth plan, it must address several internal and external challenges to ensure sustainable success. From enhancing brand visibility to

updating governance structures, modernizing course content, and managing change effectively, these challenges are critical to achieving the strategic goals of “Scale Up”.

LOW BRAND AWARENESS

COSC currently faces limited brand visibility, particularly within Connecticut. Despite its status as the state’s most affordable option for a bachelor’s degree, many residents and potential students remain unaware of COSC’s offerings, including its highly ranked online programs and focus on workforce alignment. Increasing brand awareness through a comprehensive marketing and outreach strategy will be essential to attract the desired student population and communicate COSC’s value to Connecticut’s workforce and economy.

GOVERNANCE UPDATES

COSC’s governance structure and decision-making processes require updates to reflect its evolution from a credit aggregator to an academic institution focused on workforce-aligned programs. Current policies and procedures often reflect COSC’s history rather than its role as an institution providing complete degree programs in high-demand fields. Governance updates will involve shifting policies and frameworks to support COSC’s growing academic scope, ensuring that decision-making aligns with the college’s mission to serve as Connecticut’s premier online workforce institution.

MODERN COURSE DEVELOPMENT

With the rapid evolution of online education and workforce requirements, COSC must prioritize regular updates to its course content and delivery methods. Modern learners expect courses that are engaging, accessible, and technologically advanced, including increased video content and interactive elements. COSC will need to establish a consistent schedule for curriculum updates, aligning course offerings with current industry needs and ensuring that students are equipped with relevant skills. By implementing streamlined course development processes, COSC can maintain a dynamic and responsive curriculum that meets the needs of Connecticut’s workforce.

BANDWIDTH FOR ENHANCED GUIDES

COSC needs to create comprehensive training and support guides for its different constituencies. Subject Matter Experts (SMEs) and Instructional Designers (IDs) should have clear guidelines for course design that meet the pedagogical standards of the College and the specific learning needs of the students. Faculty should have comprehensive guides that detail their expectations, various support offices, as well as professional development opportunities. This will help the faculty understand and maintain the College’s standards, especially as the institution grows and the demand for consistent quality increases. Students should be provided with user friendly guides that explain how to access the courses and access the various resources available to them. These guides will help the student experience and help them fully utilize the supports offered by the College.

CHANGE MANAGEMENT

The proposed enrollment growth and structural changes represent a significant shift for COSC, which has maintained a stable enrollment level for the past decade. Achieving rapid expansion to 6,000 students requires a robust change management strategy to guide the college community through this transformation. Adaptation to these new realities will involve implementing strategies to support faculty, staff, and students in navigating change. Training, communication, and a shared vision will be crucial to ensuring that the COSC community is aligned and prepared to meet the demands of an expanded institution.

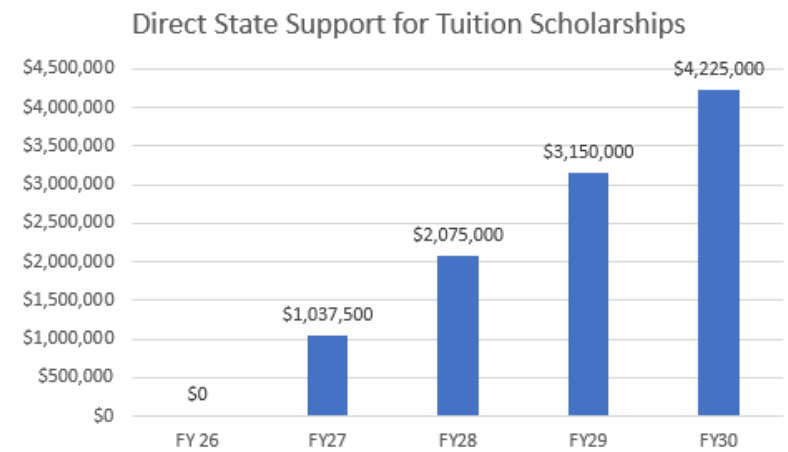
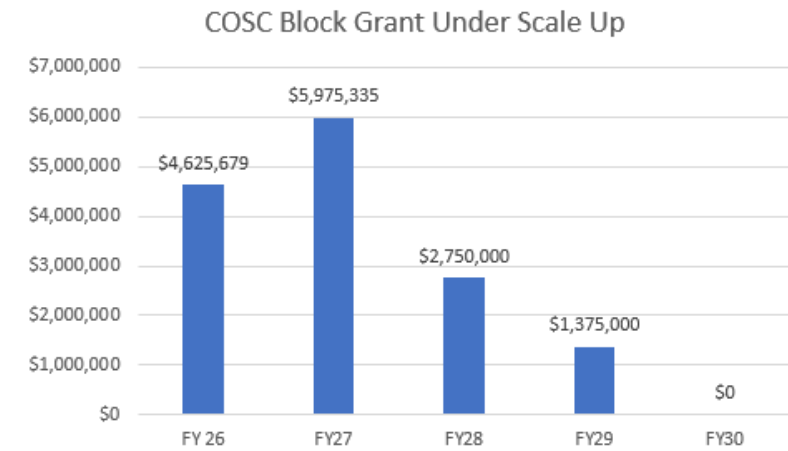
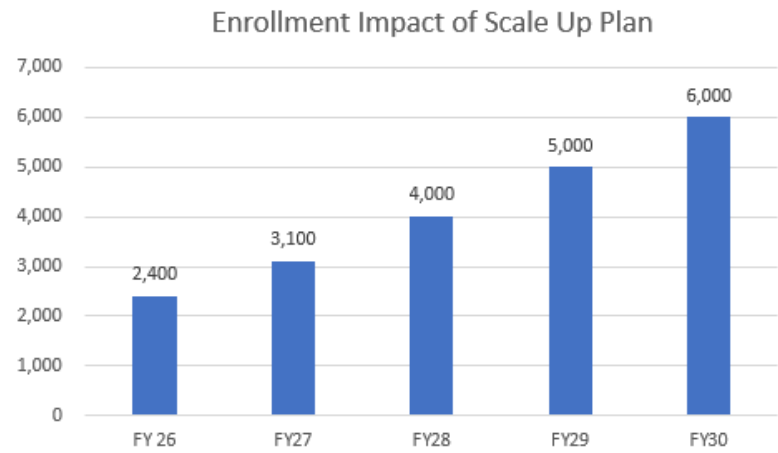
Conclusion

The “Scale Up: Affordable Pathways for Connecticut’s Workforce” plan outlines a transformative pathway for Charter Oak State College (COSC), centered on a bold initiative of introducing a Tuition-Free Bachelor’s Degree pathway for Connecticut residents to meet the workforce needs of Connecticut. Scale Up is designed to make high-quality, career-focused education accessible while reducing financial burdens for both students and the state. By adopting innovative financial strategies, expanding program offerings, and prioritizing strategic partnerships, COSC is positioned to grow its enrollment to 6,000 students within five years, meeting critical workforce needs across Connecticut. This enrollment goal indicates that COSC does not seek to be the next SNHU. Rather, we look to recapture the students already leaving the state for online degrees to give them a more cost-effective option that is more closely aligned with workforce needs specific to Connecticut.

COSC’s targeted outreach to underserved populations—such as individuals with some college but no credential, high school students in dual credit programs, and Multilingual Learners—reinforces its commitment to inclusive and accessible education. The Tuition-Free Bachelor’s Degree pathway, in particular, ensures that Connecticut residents can pursue their educational goals without accumulating significant debt, while COSC’s partnerships with CT State Community College create seamless pathways to bachelor’s degree completion.

By reducing dependency on state funding, Charter Oak State College not only enhances its operational sustainability but also sets a precedent for financial independence within public higher education. “Scale Up: Affordable Pathways for Connecticut’s Workforce” aims to bolster Connecticut’s economy by creating a skilled, career-ready workforce, expanding educational access for residents, and supporting long-term economic growth. This plan is an investment in both the college and the future of Connecticut, creating a lasting, positive impact on the state’s educational and economic landscape.

SUMMARY OF FISCAL ASK AND STUDENT ENROLLMENT



Frequently Asked Questions (FAQ): Scale Up Plan for Charter Oak State College

1. WHAT IS THE “SCALE UP” PLAN?

The Scale Up Plan is a five-year initiative to increase Charter Oak State College (COSC) enrollment from 2,000 to 6,000 students. The plan emphasizes workforce-aligned programs, affordable education through initiatives like the Tuition-Free Bachelor's Degree, and partnerships with institutions like CT State Community College.

2. WHAT IS THE TUITION-FREE BACHELOR'S DEGREE AND WHAT PROGRAMS WILL QUALIFY?

This initiative provides Connecticut residents with a pathway to earn a bachelor's degree without tuition costs. It uses a “last-dollar” scholarship model, covering remaining costs after financial aid. Graduates must reside and work in Connecticut for at least three years post-graduation for full loan forgiveness. COSC will coordinate with Connecticut's Office of Workforce Strategies (OWS) yearly to confirm the programs that would qualify for tuition-free bachelor's degree.

3. HOW DOES THE LADDERS PATHWAY WORK?

LADDERS (Leveraging Academic Degrees to Drive Employment Readiness and Success) create seamless 2+2 transfer pathways for CT State students into COSC programs. It includes concurrent enrollment options, tuition matching, and targeted communication to guide students through degree completion.

4. WHAT PROGRAMS WILL COSC EXPAND THROUGH THE SCHOOL OF EDUCATION?

The School of Education will focus on early childhood education and paraprofessional-to-

teacher certification pathways. New programs within the school are currently not offered in an online asynchronous format within CSCU and aim to address workforce shortages in Connecticut's education sector.

5. WHAT IS THE FINANCIAL GOAL OF THE SCALE UP PLAN?

The ultimate goal is to achieve financial independence from state support within five years by scaling enrollment, implementing cost-saving measures, and developing revenue-generating programs. Once the financial goal is complete, all dollars from the state will go directly to students for initiatives such as tuition-free bachelor's degree and dual credit.

6. HOW WILL COSC SUPPORT MULTILINGUAL LEARNERS?

COSC will use AI-driven tools to translate educational materials, provide multilingual accessibility, and support students in completing college-level coursework in English, enabling them to contribute to Connecticut's workforce.

7. HOW DOES THE SCALE UP PLAN BENEFIT CONNECTICUT'S ECONOMY?

By aligning programs with workforce needs, the plan aims to address labor shortages in key industries, retain talent within the state, and increase the economic contributions of graduates through higher employment rates and wages.

8. HOW DOES COSC ENSURE ITS OFFERINGS ALIGN WITH WORKFORCE NEEDS?

COSC partners with the Governor's Workforce Council, employers, and industry experts to develop programs in high-demand fields like healthcare, technology, education, and social work. As mentioned earlier, COSC will coordinate yearly with OWS for the list of programs that would be eligible for tuition-free bachelor's degree.

9. WHAT IS COSC'S ROLE AS AN ONLINE PROGRAM EXPERIENCE (OPX) PROVIDER AND IS A CSCU INSTITUTION REQUIRED TO PARTICIPATE?

As an Online Program Experience (OPX) provider, Charter Oak State College (COSC) offers shared resources and expertise in online education to other Connecticut State Colleges and Universities (CSCU) institutions. These initiatives foster collaboration, reduce duplication, and enhance efficiency. Participation in any OPX initiative is entirely voluntary, allowing each CSCU institution to evaluate whether a particular initiative aligns with its unique needs. For instance, an institution might partner with COSC to offer a course at a lower per-credit cost than their current rate. This approach enables COSC to leverage its instructional design expertise across the system.

10. HOW WILL COSC ADDRESS CHALLENGES LIKE LOW BRAND AWARENESS?

The plan includes a branding assessment, a revamped digital presence, and targeted marketing strategies to enhance visibility and attract more students. COSC will be responsible for the cost of hiring a marketing firm to conduct this work.

11. WHAT SUPPORT SERVICES WILL COSC PROVIDE AS IT SCALES UP?

In addition to hiring more professionals, COSC will invest in AI-driven tools for tutoring, advising, predictive analytics, and career coaching. These tools are designed to supplement, not replace, human resources, ensuring that students continue

to receive personalized support. By leveraging AI, the college can scale its services more efficiently while maintaining high-quality interactions. Additionally, COSC will develop comprehensive guides for students, faculty, and instructional designers to enhance the overall experience and ensure consistency as enrollment grows.

12. HOW DOES THE TUITION-FREE BACHELOR'S DEGREE ALIGN WITH STATE WORKFORCE GOALS?

The program ties funding to residency and workforce participation, ensuring that state resources are invested in retaining skilled graduates who contribute to Connecticut's economy. Only programs approved by OWS on a yearly basis will be eligible for tuition-free bachelor's degree. For example, it is anticipated programs such as social work, software development, data analytics, etc. would be eligible but a program such as psychology and sociology would not be eligible.

13. WHAT ARE THE FUNDING REQUIREMENTS FOR THE SCALE UP PLAN?

The plan requires a temporary \$3.8 million of additional state investment over two years for initiatives to have COSC achieve long-term sustainability achieved through enrollment growth and operational efficiencies. In addition, we are requesting the state establish investments in tuition-free bachelor's and dual credit to ensure all future dollars go directly to students for specific initiatives as recommended in the NCHEMS report.

14. HOW WILL TECHNOLOGY ENHANCE COSC'S OFFERINGS?

COSC will leverage AI and adaptive learning technologies to improve student outcomes, streamline operations, and provide scalable, industry-aligned educational content. COSC will be engaging with technology vendors to assist in the planning and implementation of these solutions over the next two years.

15. WHY IS 6,000 THE ENROLLMENT GOAL?

The 6,000 number was targeted as that is the enrollment goal for COSC to become financially self-sufficient based on our financial model. Should COSC exceed that goal in the long-term, the stretch goal of COSC is to become an institution that produces a net profit that can then be reinvested within CSCU.

16. WHAT IS SCNC, AND HOW IS COSC POSITIONED TO SERVE THIS POPULATION?

SCNC stands for “Some College, No Credential.” It refers to individuals who started college but did not complete a degree. COSC is uniquely positioned within CSCU to support this population through flexible online programs, six (6) different start dates, low cost, targeted advising, and its generous credit for prior learning (CPL) offerings. By leveraging partnerships with a vendor that specializes in outreach to SCNC, COSC identifies and re-engages SCNC students, providing clear pathways to complete their degrees in an efficient and cost-effective manner. Unlike previous SCNC “one-time” attempts, COSC plans to make this initiative a routine part of its enrollment activities.

17. WOULD THIS PLAN IMPACT MY ENROLLMENT AT MY CSCU INSTITUTION?

The Scale Up Plan is designed to have very limited impact on enrollment at other CSCU institutions. Its primary goal is to complement, not compete with, existing programs and minimize disruption within the system. For example, the LADDERS initiative specifically targets CT State students who are exclusively online—a population more likely to seek fully online, asynchronous bachelor’s degree programs. New programs at COSC, such as the School of Education, focus on addressing workforce needs in areas not offered in the same format by other CSCU institutions. This ensures alignment with the CSCU system’s shared goals while avoiding direct competition for on-ground and hybrid students.

National data shows that on-ground programs have been losing enrollment, while online programs, particularly at the graduate level, are experiencing growth. In Connecticut, recent gains in online enrollment have almost exclusively gone to institutions outside the CSCU system. Part of the goal of the Scale Up Plan is to retain these tuition dollars within the system by offering competitive, high-quality online programs.

While some programs within the CSCU system have experienced enrollment shifts due to new online offerings—such as RN to BSN programs—data shows that COSC has not been the primary driver of these changes. Instead, institutions like SNHU, Goodwin University, and Post University have seen significant growth in online programs, as traditional in-person equivalents have declined.

To address potential overlap, all proposed program changes that could impact existing offerings are carefully analyzed, and any potential effects are presented to the board for assessment as part of the new program approval process.

Scaling Taskforce Report