



Southern Connecticut State University

FACULTY SENATE

APPROVED MINUTES OF JANUARY 29, 2025

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

The 9th Meeting of the Faculty Senate AY 2024-2025 was held on January 29, 2025, at 12:11 p.m. via Zoom.

Attendance

FIRST	LAST	DEPARTMENT	TERM ENDS (SPRING)	ATTENDANCE	TOTAL
Lisa	Haylon	Accounting	2025	✖	3/9
Valerie	Andrushko	Anthropology	2026		7/9
Jeff	Slomba	Art & Design	2027		8/8
		Athletics	2026		
Nicholas	Edgington	Biology	2026		8/9
Kate	Toskin	Business Information Systems	2025		8/8
Jeff	Webb	Chemistry & Biochemistry	2026		8/9
Shawneen	Buckley	Communication Disorders	2027		8/8
Melanie	Savelli	Communication, Media & Screen Studies	2025		6/9
Shafaeat	Hossain	Computer Science	2025		8/9
Matthew	Ouimet	Counseling	2027		7/9
Laurie	Bonjo	Counseling & School Psychology	2026	✖	6/9
Beena	Achhpal	Curriculum & Learning	2027		8/8
Maria	Diamantis	Curriculum & Learning	2024		8/8
Jennifer	Cooper Boemmels	Earth Science	2025		8/8
Younjun	Kim	Economics	2027		8/8
Peter	Madonia	Educational Leadership & Policy Studies	2026	✖	5/9
Paul	Petrie	English	2026		8/9
Mike	Shea	English	2027		7/9
Eric	West	Environment, Geography, & Marine Sciences	2025		8/9
Sandip	Dutta	Finance & Real Estate	2025		7/9
Amanda	Strong	Healthcare Systems & Innovation	2025		8/9
Matthew	Rothbard	Health & Movement Sciences	2025		6/7
Daniel	Swartz	Health & Movement Sciences	2025		8/8
Christine	Petto	History	2026		8/8
Polly	Beals	History	2026		8/8
Yan	Liu	Information & Library Sciences	2027		8/8
Cindy	Simoneau	Journalism	2027		8/8
Elizabeth	Wilkinson	Library Services	2026		8/8

Amy	Jansen	Library Services	2025		8/9
Alison	Wall	Management & International Business	2025		8/8
Melvin	Prince	Marketing	2026	✖	4/9
Sebastian	Perumbilly	Marriage & Family Therapy	2025	✖	8/9
Ray	Mugno	Mathematics	2025	✖	8/9
Owen	Biesel	Mathematics	2025		8/8
Jonathan	Irving	Music	2026	✖	6/9
Deborah	Morrill	School of Nursing	2026		8/8
Elizabeth	Hurlbert	School of Nursing	2027		8/9
Virginia	Metaxas	Part-Time Faculty (HIS)	2026	✖	8/9
Garbielle	Ferrell	Part-Time Faculty (JRN)	2025		8/8
		Part-Time Faculty	2027		
		Part-Time Faculty	2027		
Rex	Gilliland	Philosophy	2026		8/8
Evan	Finch	Physics	2027		8/8
Jonathan	O'Hara	Political Science	2025	✖	0/9
Katherine	Marstand	Psychology	2025	✖	5/7
Patricia	Kahlbaugh	Psychology	2027		2/2
John	Nwangwu	Public Health	2027		8/8
Deron	Grabel	Recreation, Tourism, & Sport Management	2026		8/9
Isabel	Logan	Social Work	2026		8/8
Stephen Monroe	Tomczak	Social Work	2025		8/8
Gregory	Adams	Sociology	2026		8/9
Joan	Weir	Special Education	2027	✖	7/9
Douglas	Macur	Theatre	2027		7/9
Tricia	Lin	Women's & Gender Studies	2025		8/9
Luke	Eilderts	World Languages & Literatures	2026		7/9
Natalie	Starling	SCSU Faculty Senate President	2025		8/8
Dwayne	Smith	Interim SCSU President			8/9
Barbara	Cook	Chair, Graduate Council			8/8
Meghan	Barboza	Chair, Undergraduate Curriculum Form			8/9
Riyanna	Singleton	SGA		✖	

GUESTS

Cheri Smith
 Craigh Hlavac
 Dyan Robinson
 Julia Irwin
 Lillian Wanjagi
 Linda Cunningham
 Margaret Generali
 Marilu Rochefort
 Marty Guay
 Steven Hoffler
 Uchenna Nwachuku

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)
Ad Hoc Committee for Formalizing Faculty Advising	Michael Shea Stephen Monroe Tomczak Virginia/Ginny Metaxas Jeffrey Webb
ACT/KPI Committee	Natalie Starling
Administrative Faculty Senate	Kate Marsland
Chief Information Officer (CIO) Search Committee	Matt Rothbard
Commencement Planning Committees	Maria Diamantis
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

January 29, 2025

Faculty Senate President Natalie Starling called the 9th meeting of the Faculty Senate to order at 12:12 p.m. via Zoom.

- I. Welcome and Opening Remarks from Interim President D. Smith
 - A. Interim President Smith opened his remarks by welcoming senators and acknowledging the Board of Regents Chair, M. Guay. He reflected on personal and institutional history as sources of resilience and motivation, emphasizing the university's role in providing equitable opportunities for a diverse student body.
 - B. Historical and Institutional Perspective
 - i. Interim President Smith shared personal reflections on his family's history and historical challenges faced by marginalized communities. He highlighted Southern's founding in 1893 by three women who overcame societal barriers to establish the institution. He emphasized the university's continued commitment to social justice, equity, and educational access for first-generation college students.
 - C. University Response to potential ICE Raids
 - i. Interim President Smith provided a detailed protocol for handling potential ICE interactions on campus, including
 - 1. All ICE inquiries should be directed to the university president or designated officials (Chief of Police).
 - 2. No information should be provided to ICE agents without consulting CSCU General Counsel.
 - 3. Campus security personnel are not authorized to inquire about immigration status or detain individuals solely based on their status.
 - ii. Senators were reassured that ICE enforcement actions would not begin in classrooms and were encouraged to follow the established protocol if an incident occurred.
 - D. Impact of Federal Executive Orders on Higher Education
 - i. Interim President Smith addressed concerns regarding recent executive orders that could impact federal funding for diversity, equity, and inclusion (DEI) initiatives. While financial aid, Pell Grants, and Title IV benefits remain unaffected, certain federal grants may be at risk. The university plans to create a dedicated webpage to provide ongoing updates on policy changes and their potential implications.
 - E. Faculty and Student Concerns
 - i. Faculty raised concerns about ICE enforcement practices and how best to protect students. Dr. Smith reassured faculty that campus security would not participate in ICE enforcement actions. A question was raised regarding whether faculty should discuss ICE-related issues in the classroom. Dr. Smith advised faculty to focus on ensuring students have accurate information while also being mindful of their emotional well-being. Concerns were also raised about potential budgetary impacts from federal policy changes. Dr. Smith stated that, as of now, no immediate disruptions were expected, but the situation remained fluid.
 - F. Closing Remarks
 - i. Interim President Smith reiterated the importance of resilience, adaptability, and courage in navigating institutional challenges. He emphasized that despite policy uncertainties, Southern remains committed to its mission of providing educational

access and fostering student success. Faculty were encouraged to reach out with any further questions or concerns and were reminded that regular updates would be provided.

II. Welcome and Opening Remarks from Interim Provost, Dr. J. Irwin.

- A. Interim Provost J. Irwin addressed the Faculty Senate, providing updates on various institutional matters and ongoing initiatives.
- B. Grant-Funded Positions and Budgetary Concerns
 - i. Interim Provost Irwin noted that some campus positions are partially funded by grants, and while there is potential for future impacts, the state governor has indicated that the state may cover these positions if federal funding is reduced. The situation remains fluid, and updates will be provided as more information becomes available.
- C. R2 Research Classification Update
 - i. Interim Provost Irwin reported on the university's progress toward obtaining an R2 designation from the Carnegie Classification. The university's data was verified with the Carnegie office and appears consistent with an R2 classification. An official announcement is expected in early February, with a public embargo on the announcement until February 13. To prepare for this transition, Interim Provost Irwin is assembling a panel of stakeholders, including faculty, staff, and students, to consult with representatives from institutions that have recently transitioned to R2 or R1 status. This panel will address potential challenges and best practices.
- D. Charter Oak State College Proposal
 - i. Interim Provost Irwin briefly addressed the proposal from Charter Oak State College, which aims to become the primary provider of online courses within the system and reduce free teaching obligations. She acknowledged faculty concerns regarding the implications of this proposal, particularly related to pedagogical standards and faculty qualifications. She referenced a report by B. Zamfir, who served on a related panel and offered insights on online pedagogy and best practices.
- E. ACT and Key Performance Indicators (KPIs)
 - i. Interim Provost Irwin outlined the process for developing ACT KPIs, emphasizing broad participation from faculty, staff, and students. A document detailing the ACT pillars was shared with the campus community, and anonymous feedback was solicited on potential KPIs. This information will be reviewed and organized by a committee, including Faculty Senate representatives, before being presented to the Provost's Leadership Team (PLT), deans, and ultimately the Board of Regents (BOR). The goal is to ensure community-wide input and buy-in, reflecting Southern's unique institutional identity. She highlighted the need for clarification from BOR Chair M. Guay regarding the financial scope and timeline of KPIs, as well as whether they should be tailored specifically to Southern or aligned with a broader system-wide approach.
- F. Faculty Concerns Regarding Charter Oak Faculty Qualifications
 - i. Senator M. Shea raised concerns about Charter Oak's job postings for content creators in their master's programs, noting that only a master's degree was required for instructors. Interim Provost Irwin acknowledged these concerns, noting that

faculty from Southern and other institutions, such as Western, had expressed similar apprehensions about program standards and faculty qualifications.

III. M. Guay, Chair, Board of Regents

- A. Board of Regents Chair M. Guay was welcomed by Faculty Senate President Natalie Starling, who expressed gratitude for his engagement with the faculty and willingness to discuss critical topics. Guay began by introducing himself, noting his tenure as Chair of the Board of Regents for six to seven months and as a board member for approximately 18 months. He emphasized his appreciation for the faculty's role in driving student success and framed the session as an opportunity to engage in collaborative dialogue.
- B. Charter Oak Task Force and Online Education
 - i. M. Guay addressed the Charter Oak State College Task Force and its role in exploring the future of online education within the system. He clarified that the report generated by the task force, led by Regent Yang, was intended to initiate discussions rather than represent final decisions. M. Guay acknowledged that while some elements of the report were contentious, it was a starting point to explore how online education could be integrated into the broader system. He emphasized that while online education is an essential modality, the goal is not to transform the entire system into an online institution. Guay expressed a personal preference for in-person learning due to its positive impact on student outcomes and soft skills development. Faculty expressed concerns about the proposal, particularly regarding faculty qualifications for online programs. M. Guay acknowledged these concerns, noting the importance of maintaining academic rigor and faculty engagement in online pedagogy discussions.
- C. ACT Framework (Access, Completion, Talent)
 - i. M. Guay outlined the ACT Framework, designed to expand the university's engagement with students at various stages of their educational journey.
 - 1. Access: Focus on increasing early education opportunities, dual enrollment, and early college programs. M. Guay highlighted Connecticut's low ranking (50th out of 50 states) in dual enrollment participation and stressed the need to expose students to higher education earlier.
 - 2. Completion: Emphasis on ensuring students maximize their potential while enrolled, with support systems to help those who do not complete their degrees. Guay advocated for developing ways to recognize students' achievements even if they do not graduate, to avoid the perception of failure.
 - 3. Talent: The framework also focuses on enhancing students' work-based learning experiences through apprenticeships, internships, and community engagement. Guay highlighted the importance of connecting students to the workforce and ensuring they graduate with both academic knowledge and practical experience.
 - ii. M. Guay clarified that the Key Performance Indicators (KPIs) associated with the ACT framework should be tailored to individual institutions, although some system-wide consistency might be beneficial. He emphasized that KPIs should be tools to highlight successes and attract further investment rather than punitive measures.
- D. Broadening Higher Education's Purpose

- i. In response to faculty concerns about the increasing focus on workforce development over civic education, M. Guay acknowledged the importance of producing well-rounded, engaged citizens. He affirmed the value of liberal arts education while also recognizing the necessity of preparing students for the modern workforce. M. Guay cited digital literacy as a critical skill and encouraged blending traditional academic programs with practical, technology-oriented skills.
 - ii. M. Shea emphasized the need for a balance between job preparation and fostering an engaged citizenry. Guay agreed, noting that higher education's role is both to develop good citizens and to ensure students are equipped to succeed in today's job market.
 - E. Support for New Initiatives and Funding Challenges
 - i. H. Lockwood raised concerns about limited resources for new initiatives, highlighting the need for seed funding to develop innovative programs, such as the new Critical Disability Studies minor. M. Guay acknowledged the challenge of "doing more with less" and suggested exploring alternative funding sources beyond state allocations and tuition. He expressed interest in creating competitive grants and tapping into foundations and endowments to support innovative educational initiatives. He criticized the current model of yearly legislative appeals for funding and advocated for a long-term funding strategy or "grand bargain" with the state to ensure sustainable support for higher education.
 - F. Data-Driven Decision-Making and Student Outcomes
 - i. Faculty inquired about the data driving assumptions regarding student success and employability, especially for those who leave before completing their degrees. M. Guay acknowledged that comprehensive data on student outcomes might be lacking and emphasized that KPIs should sharpen the questions rather than solely provide answers. He encouraged faculty to focus on identifying the right questions that will guide effective strategies for student support and institutional improvement. He also highlighted the importance of understanding why students leave and how the university can better support their transitions, whether into the workforce, other educational opportunities, or personal growth.
 - G. Closing Remarks
 - i. M. Guay concluded by reiterating his commitment to supporting faculty and fostering collaboration to improve student outcomes. He invited further dialogue, offering to return for future meetings and discussions. Faculty were encouraged to submit additional questions and continue participating in the ongoing development of ACT KPIs and online education initiatives.
- IV. Minutes of the previous meeting held on January 22, 2024, were accepted as distributed.
<https://inside.southernct.edu/faculty-senate/meetings>
- V. Faculty Senate President's Report
<https://inside.southernct.edu/faculty-senate/meetings>
 - A. State and University Budget Updates
 - i. President Natalie Starling provided updates related to the state and university budgets, particularly in light of the new legislative session:
 - B. AAUP Announcements and Meetings

- i. Faculty were reminded of upcoming AAUP meetings addressing federal changes impacting higher education. Meetings are scheduled for January 31st and February 7th. A Southern chapter meeting will be held on Monday, February 3rd at 2:30 PM via Zoom. Budget Meeting: A budget meeting, scheduled after the report was initially written, is set for February 7th.

C. Introduction of Dr. Lillian Wanjagi

- i. Dr. Lillian Wanjagi was introduced to the Faculty Senate. She expressed gratitude for the warm welcome and shared her background in finance and administration within the UNC and Texas systems. Dr. Wanjagi highlighted her focus on addressing fiscal challenges, including work on the university's five-year budget. She invited faculty to reach out with questions and concerns, emphasizing her open-door policy and commitment to collaboration.

D. Blackboard System Challenges and Faculty Concerns

- i. N. Starling addressed ongoing challenges with Blackboard that faculty have been experiencing since the beginning of the year: Reporting Issues: Faculty were encouraged to report any technical issues to President Starling and the Technology Committee Co-Chairs (J. Webb and D. Macker). Faculty were advised that the Help Desk Ticket System is the current recommended pathway for Blackboard support. Direct contact with Blackboard administrators is no longer encouraged due to recent administrative changes. Starling reassured faculty that the Executive Committee is in regular contact with Academic Technology and is monitoring the impact of these changes.

- ii. Faculty Feedback on Blackboard Issues

- 1. T. Lin informed the Senate of a personnel change, noting that Randy Simpson is now the Blackboard administrator following Karen's departure.
- 2. S. M. Tomczak expressed frustration with the new help desk system, describing it as cumbersome and bureaucratic. He emphasized the need for clarity regarding the switch from direct support to the ticketing system and called for a broader discussion at a future Senate meeting.
- 3. P. Kahlbaugh raised concerns about Blackboard's limited repository window of three to four years for course copies. She questioned why older courses could not be retained longer, particularly for faculty who teach courses on a rotational basis.
- 4. B. Achhpal highlighted the lack of real-time, human support for urgent technical issues. She noted that automated responses from the help desk are often insufficient and emphasized the need for better communication and timely assistance, especially during critical times like the start of a semester.
- 5. N. Starling acknowledged these concerns and reiterated that many of the issues stem from understaffing and under-resourcing at the institution. She emphasized the Senate's commitment to ensuring faculty are not negatively affected by these challenges, including potential impacts on student opinion surveys.

E. SCSU Presidential Search Update

- i. N. Starling provided an update on the upcoming presidential search. A website for the presidential search has been launched, which includes details about the process and co-chairs of the search committee. While Starling is a member of the

search committee, she clarified that she is not authorized to speak on behalf of the committee. A search advisory committee will be formed, which will include five faculty members. An all-call for nominations and subsequent election will take place over the next two weeks. Faculty were encouraged to share the search website with colleagues and to look out for forthcoming campus-wide announcements from the Faculty Senate Elections Officers. N. Starling confirmed that the President's Report consisted of the documents shared via email and in the meeting packet regarding the Charter Oak initiative and faculty responses.

VI. Election of Faculty Senate Representation on the committee for ACT/KPI.

A. Elections Officer O. Biesel called for nominations.

i. N. Starling self-nominated. The nomination was seconded.

1. N. Starling was **approved** by unanimous consent to represent the Faculty Senate on the committee for ACT/KPI.

VII. N. Starling asked if there was any objection to moving to new business.

A. Hearing no objection, the body moved to new business.

VIII. New Business

A. N. Starling and D. Grabel presented on behalf of the Study Policy Committee the Resolution Regarding Revisions to Credit Overload Policies for Summer and Winter Session.

i. N. Starling introduced the resolution from the Student Policy Committee regarding revisions to the credit overload policy for both undergraduate and graduate students during summer and winter sessions.

1. Summer Session Credit Limit: A limit of 12 credits during the summer session unless an overload is approved.
2. Winter Intercession Credit Limit: A limit of 4.5 credits during the winter intercession unless an overload is approved.

ii. The policy applies to both undergraduate and graduate students.

iii. Following the presentation, the resolution was opened to the floor for debate.

iv. Clarification of Credit Limits:

1. H. Lockwood inquired whether the 12-credit limit applies cumulatively across all summer sessions (A, B, and C) or to individual sessions. N. Starling confirmed that the limit is cumulative for the entire summer session, a point further verified by D. Grabel, co-chair of the Student Policy Committee.

v. Concerns About Credit Load Feasibility:

1. P. Petrie raised concerns about the feasibility and advisability of allowing students to take 12 credits within a single summer session. P. Petrie emphasized that students would struggle to manage this workload effectively, compromising educational quality.
2. P. Petrie moved to amend the resolution by inserting "(6 credits per session)" after "Summer session" and before ", unless" in the first "Resolved" statement. Seconded.
 - a. M. Savelli expressed concern that limiting students to 6 credits per session could negatively affect those enrolled in internships, which

often carry 9 credits. She highlighted that internships may not align neatly with session schedules and often finalize details after the traditional academic year ends, making it difficult for students to plan ahead. She also noted that some faculty may not regularly check their email during summer, complicating the overload approval process for students who decide to enroll later in the summer.

- b. C. Simoneau clarified that in her department, internships span all three summer sessions (A, B, and C). This structure allows students to accumulate credits across the full summer, potentially mitigating concerns about session-specific limits. She expressed hope that this flexibility would not complicate the proposed amendment.
- c. M. Shea supported P. Petrie's amendment, emphasizing the importance of maintaining an educationally sound credit load of 6 credits per session. He argued that students needing to exceed this limit could pursue an overload approval, a process he described as not overly burdensome. M. Shea suggested that faculty teaching during the summer should be available to assist students with overload approvals, ensuring the process remains accessible. He believed the amendment was workable for most students, and any exceptions (such as internships) could be managed through existing approval mechanisms.
- d. Graduate Council chair B. Cook raised concerns about the amendment's potential disruption to graduate programs, particularly those with mandatory summer coursework. She noted that many graduate students in her program take 15 credits during the summer, as permitted under the current graduate catalog language, which treats the summer as a full semester. Implementing the new limit would require the graduate coordinator to file overload requests for 45 students, creating a significant administrative burden. She suggested that the Senate consider tabling the amendment to gather more information about programs that may be adversely affected by the proposed changes.
- e. C. Simoneau added that while the overload approval process may not be cumbersome, it does include a GPA minimum requirement. This could exclude some students from obtaining overload approvals, particularly those with lower GPAs, thereby limiting their ability to take additional credits even when necessary for academic progress.
- f. L. Eilderts **moved to recommit** the resolution to the Student Policy Committee. **Seconded.**
 - i. N. Starling asked if there was any objection to recommitting the resolution to the Student Policy Committee. Hearing none, the resolution was recommitted.

B. Presentation of Department Split: Department of Counseling and School Psychology

- i. N. Starling recused herself from the debate and transferred the chairpersonship to P. Petrie, chair of the Rules committee.

1. M. Generali opened the discussion by acknowledging the prolonged turmoil within the department, which had begun to affect the programs and students. The department, after engaging in extensive consultations with Human Resources, the union, ombudspersons, and the administration, concluded that a departmental split was the best course of action. Faculty input was integral throughout the process, ensuring a collaborative approach to resolving internal issues. The split would result in: The Counselor Education Department housing the Counselor Education and Supervision Doctoral Program and the School Counseling Master's and Sixth-Year Programs. The Mental Health Services Department containing the School Psychology Master's and Sixth-Year Programs and the Clinical Mental Health Master's Program. M. Generali emphasized the commitment to a smooth transition, ensuring students continue to receive the necessary support while fostering ongoing collaboration between the new departments.
 2. U. Nwachuku provided additional context. U. Nwachuku recounted the department's historical development, highlighting his role in establishing accreditation standards for Clinical Mental Health Counseling. He noted that while the department had experienced challenges and internal conflicts, the decision to split was the result of thorough deliberation and aimed at resolving long-standing issues. U. Nwachuku expressed optimism about the future collaboration between the two new departments, now emerging from one shared history.
 3. C. Simoneau inquired whether all current faculty members would remain within the new departmental structure or if any would be exiting due to the split. M. Generali confirmed that all faculty members would be included in one of the two new departments, ensuring continuity and stability for both faculty and students.
 4. T. Lin expressed her support and admiration for the hard work undertaken to navigate the departmental challenges. She recognized the struggles faced over many years and commended the efforts of faculty, deans, and provosts in reaching a solution that reflects the collective decision of the faculty. T. Lin emphasized that, given the comprehensive nature of the consultations and the faculty's consensus, there was no reason not to support the proposed changes.
- ii. After the presentations and questions from senators, the body moved to a vote.
 1. Vote tally
 - a. Yes24
 - b. No3
 - i. The department split was **endorsed** by the Faculty Senate.

IX. Adjournment

A. J. Webb **moved to adjourn. Seconded.**

- i. The meeting adjourned at 1:59 p.m.

L. Eilderts
Secretary



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 CSCU 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 CSCU 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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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 CSU 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 CSU 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 (CSU) 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.

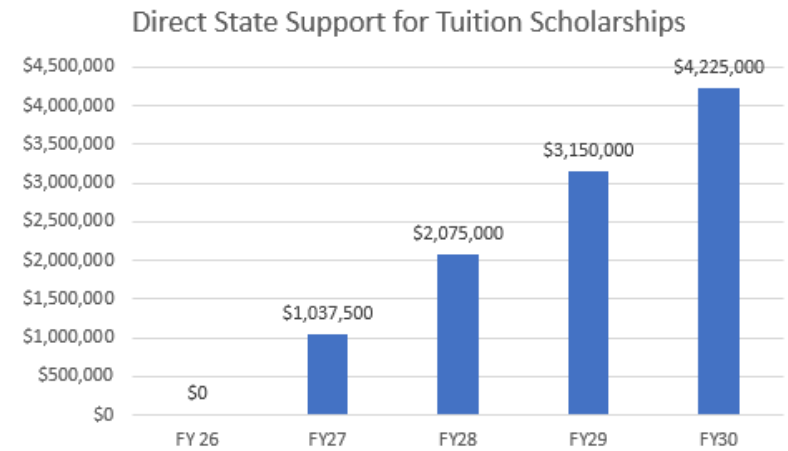
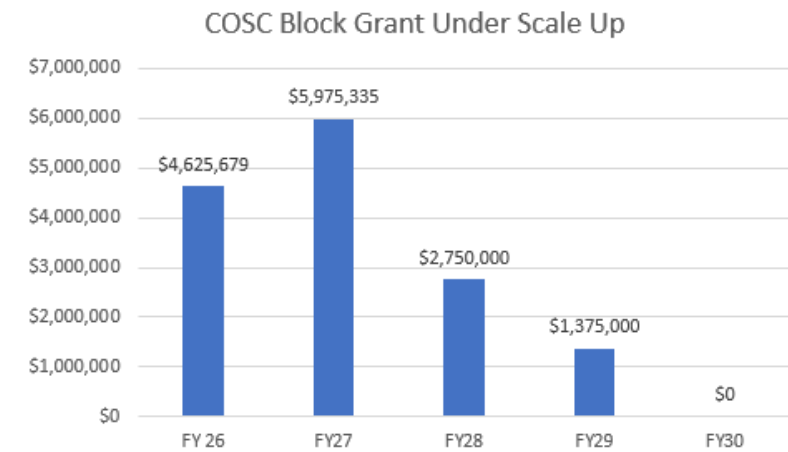
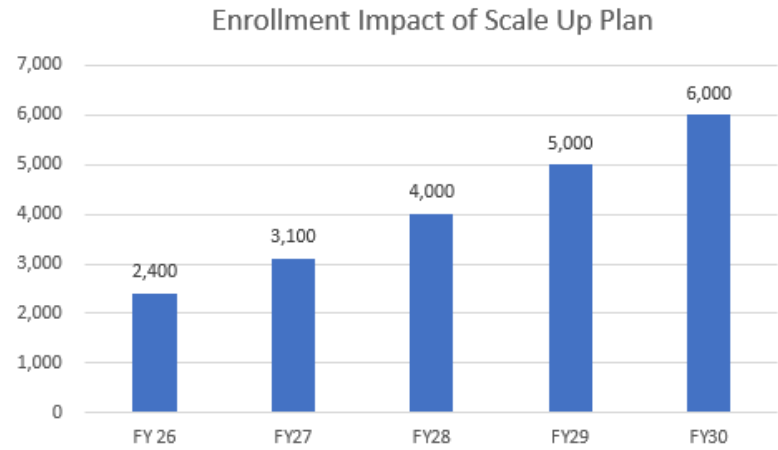
Conclusion

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.

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.

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.

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.

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.

CharterOak
STATE COLLEGE
A Higher Degree of Online Learning

Scaling Taskforce Report

Memorandum from the Penn Hill Group re: President Trump's Initial Executive Orders and Presidential Memoranda



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MEMORANDUM

TO: **Interested Parties**
FROM: **Penn Hill Group**
DATE: **January 24, 2025**
SUBJECT: **President Trump's Initial Executive Orders and Presidential Memoranda**

On January 20 and 21, the first two days of his new Administration, President Trump signed Executive Orders and Presidential Memoranda addressing a wide range of policy areas and administrative issues. The purpose of this memorandum is to summarize those documents that address or will have an impact on education and workforce development or will affect the operations of the U.S. Departments of Education and Labor. This summary follows.

Gender Identity

An [Executive Order](#) titled "Defending Women from Gender Ideology Extremism and Restoring Biological Truth to the Federal Government" declares that it is the policy of the United States that there are two sexes, male and female, with an individual's sex based on "immutable biological classification" established at the time of birth. It directs all Federal agencies to enforce sex-based rights, policies, opportunities and accommodations so as to protect men and women as biologically distinct sexes and to use the term "sex," rather than "gender," in policies and documents. Further, it orders agencies not to fund or promote gender ideology¹ and to "remove" agency statements, policies, regulations, forms and communications that promote or otherwise inculcate gender ideology.

Diversity, Equity and Inclusion (DEI)

An [Executive Order](#) titled "Ending Radical and Wasteful Government DEI Programs and Preferencing" orders the Office of Management and Budget (OMB) to coordinate the termination of "all discriminatory programs, including illegal DEI and 'diversity, equity, inclusion, and accessibility' (DEIA) mandates, policies, programs, preferences, and activities in the Federal Government". It also directs the Office of Personnel Management (OPM) to review and revise Federal employment practices, union contracts and training programs to ensure that they are consistent with the purposes of the order.

Further, the order directs all Federal agency heads to:

¹ The Executive Order defines "gender ideology" as follows: "Gender ideology" replaces the biological category of sex with an ever-shifting concept of self-assessed gender identity, permitting the false claim that males can identify as and thus become women and vice versa, and requiring all institutions of society to regard this false claim as true. Gender ideology includes the idea that there is a vast spectrum of genders that are disconnected from one's sex. Gender ideology is internally inconsistent, in that it diminishes sex as an identifiable or useful category but nevertheless maintains that it is possible for a person to be born in the wrong sexed body.

- Terminate all DEI, DEIA and environmental justice offices and positions, as well as all equity action plans and initiatives, equity-related grants or contracts, and DEI or DEIA-related performance requirements for employees, contractors, or grantees;
- Provide OMB with a list of all: (1) agency DEI, DEIA, or environmental justice positions, committees, programs, services, activities, budgets and expenditures in existence on November 4, 2024, and an assessment of whether any of these have been relabeled in an attempt to preserve their pre-November 4 function; (2) Federal contractors that have provided DEI training or training materials to the agency; and (3) grantees that have received Federal funding to provide or advance DEI, DEIA or environmental justice programs, services or activities since January 20, 2021;
- Direct the deputy agency head to: (1) assess the operational impact (e.g., number of new DEI hires) and cost of the Biden Administration's DEI, DEIA and environmental justice programs and policies; and (2) recommend actions to align the agency's programs, activities, policies, regulations, guidance, employment practices, enforcement activities, contracts, grants, consent orders and litigating positions with the policy of "equal dignity and respect" set forth in this Executive Order.

The Order also directs the Assistant to the President for Domestic Policy to convene monthly meetings of agency heads in order to hear reports on the prevalence and costs of DEI, DEIA and environmental justice policies, programs, etc., in agency programs; discuss barriers to compliance with the Executive Order; monitor and track agency compliance with the Order; and identify potential areas for additional legislative action.

Note that the Order does not define the terms "Diversity, Equity, and Inclusion," "Diversity, Equity, Inclusion, and Accessibility" and "environmental justice."

A related but separate [Executive Order](#), titled "Ending Illegal Discrimination and Restoring Merit-Based Opportunities" also criticizes DEI and DEIA policies and orders agencies to terminate all "discriminatory and illegal preferences, mandates, policies, programs, activities, guidance, regulations, enforcement actions and requirements." It further directs agencies to combat private-sector DEI preferences, mandates, policies, programs and activities.

In furtherance of those objectives, this second Order, among other things:

- Revokes four Executive Orders, and one Presidential Memorandum, issued between 1965 and 2016 and dealing with diversity and inclusion, environmental justice and equal employment opportunity;
- Directs the Office of Federal Contract Compliance Programs in the U.S. Department of Labor (DOL) to cease promoting diversity, holding Federal contractors responsible for taking "affirmative action"; and allowing contractors to practice workforce balancing based on race, color, sex, sexual preference, religion or national origin;



- Prohibits Federal contractors and subcontractors from having employment, procurement and subcontracting practices that consider race, color, sex, sexual preference, religion or national origin in a manner that violates the nation's civil rights law;
- Requires the deletion of references to DEI, DEIA and similar terms and principles from Federal processes, guidance and acquisition and grant-making procedures;
- Directs all agencies to take actions to end the use of "illegal discrimination and preferences, including DEI" in the private sector. Toward that end, the Order directs the U.S. Department of Justice (DOJ) to prepare, in consultation with relevant agencies, a "strategic enforcement plan" that: (1) identifies key "sectors of concern" within each agency's jurisdiction; (2) identifies the most "egregious and discriminatory DEI practitioners" in each sector; (3) sets forth a plan for deterring DEI programs or principles that constitute illegal discrimination or principles, including, for each agency up to nine potential civil compliance investigations of corporations, large nonprofit organizations, foundations with assets of at least \$500 million, State or local bar and medical associations and institutions of higher education (IHEs) with endowments of over \$1 billion; (4) potential litigation, regulatory action and subregulatory guidance; and
- Requires the Departments of Justice and Education to jointly issue, within 120 days, guidance to all State and local educational agencies (LEAs), and all IHEs that receive Federal grants or whose students receive Federal loans, regarding measures and practices required to comply with the Supreme Court's *Students for Fair Admissions v. President and Fellows of Harvard College* decision.

Free Speech and Censorship

In an [Executive Order](#) titled, "Restoring Freedom of Speech and Ending Federal Censorship," the President declares that it is the policy of the United States, briefly, to: (1) secure the right of the American people to engage in constitutionally protected free speech; (2) ensure that no Federal employee or agency engages in or facilitates conduct abridging constitutionally protected free speech; (3) ensure that no taxpayer resources are used to abridge free speech; and (4) identify and correct any past Federal misconduct related to censorship of free speech. The Order further directs the Attorney General to investigate and report on any activities of the Federal government over the last four years that were inconsistent with that policy.

Suspension of Refugee Admissions

An [Executive Order](#) suspends the admission of refugees into the United States effective January 27, with the Department of State and the Department of Homeland Services (DHS) jointly authorized to admit refugees on a case-by-case basis. Otherwise, the admission of refugees will be resumed when the President determines that doing so would be in the national interest. The order also directs DHS to determine the extent to which, consistent with applicable law, State and local officials can be more involved in determining the placement or resettlement of refugees in their jurisdiction.



Illegal Immigration

An [Executive Order](#) titled “Protecting the American People Against Invasion” declares that it is the policy of the United States to “faithfully execute the immigration laws against all inadmissible and removable aliens” and “to achieve the total and efficient enforcement of those laws, including through lawful incentives and detention capabilities.” The order focuses mainly on law enforcement, detention and deportation issues. Activities carried out pursuant to the order could have an impact on schools and colleges, but there are no provisions that specifically address education or workforce development.

Other Executive Orders and Policy Memoranda Affecting the Departments of Education and Labor (along with Other Federal Agencies)

The following documents include directives to all Federal agencies, including the Departments of Education and Labor.

- An [Executive Order](#) titled “Return to In-Person Work” orders all agencies to take all necessary steps to terminate remote work arrangements and require employees to return to in-person work on a full-time basis (with exemptions as necessary).
- A [Presidential Memorandum](#) titled “Regulatory Freeze Pending Review” orders agencies not to issue any proposed or final regulations until they are reviewed by agency heads appointed by the new Administration (with OMB authorized to grant exemptions in emergency situations). It also orders agencies to consider delaying (for the purpose of further review) the effective date of any rule that has been published in the Federal Register but has not yet taken effect.
- A [Presidential Memorandum](#) orders a hiring freeze, covering all Federal agencies but exempting military personnel and positions related to immigration enforcement, national security, and public safety and any actions that would affect the provision of Social Security, Medicare or veterans’ benefits. Further, the Order directs OMB to prepare and submit, within 90 days, a plan to reduce the size of the Federal workforce through efficiency improvements or attrition. Once that plan is submitted, the hiring freeze will end, except with respect to the Internal Revenue Service.²
- A [Presidential Memorandum](#) titled “Delivering Emergency Price Relief for American Families and Defeating the Cost-of-Living Crisis” directs all agencies to “deliver emergency price relief, consistent with applicable law, to the American people and increase the prosperity of the American worker.” This Memorandum lists types of actions that agencies might take, one of which is to “create employment opportunities for American workers, including drawing discouraged workers into the labor force.”

² The IRS freeze will end when the Secretary of the Treasury determines that it is the national interest to lift it.

- An [Executive Order](#) titled, “Restoring Accountability to Policy-Influencing Positions within the Federal Workforce” reinstates the “Schedule F” hiring authority that was initiated late in the first Trump Administration and terminated under President Biden. Under these policies, Federal positions of a “confidential, policy-determining, policy-making, or policy-advocating character” are not covered by Civil Service employment protections. The new Order makes some changes to the original provisions, including replacing the term “Schedule F position” with “Policy/Career position” and stating:

“Employees in or applicants for Schedule Policy/Career positions are not required to personally or politically support the current President or the policies of the current administration. They are required to faithfully implement administration policies to the best of their ability, consistent with their constitutional oath and the vesting of executive authority solely in the President. Failure to do so is grounds for dismissal.”

- An [Executive Order](#) titled “Establishing and Implementing the President’s ‘Department of Government Efficiency’”: (1) renames the existing United States Digital Service³ as the United States DOGE Service (USDS) within the Executive Office of the President; and (2) establishes, within the USDS, a U.S. DOGE Service Temporary Organization, terminating on July 4, 2026 and charged with advancing the DOGE agenda, which the Order describes as modernizing Federal technology and software so as to maximize government efficiency and productivity..

The Order also directs each Federal agency to establish a DOGE Team of at least four members (which the order says will “typically” include a team lead, an engineer, a human resource specialist and an attorney) to advise the agency head on implementing the President’s DOGE agenda. Agencies are to take all necessary steps, consistent with law, to ensure that the USDS has full and prompt access to all unclassified agency records, software systems and information technology systems.

- An [Executive Order](#) titled “Reforming the Federal Hiring Practice and Restoring Merit to Government Service” directs the Assistant to the President for Domestic Policy to, within 120 days, develop and send to the agencies a Federal hiring plan that, briefly:
 - Prioritizes the recruitment of individuals who are committed to improving the efficiency of the Federal government, passionate about the ideals of the American republic and committed to upholding the law;
 - Prevents the hiring of individuals based on their race, sex, or religion;
 - Implements, to the greatest extent possible, technical and alternative assessments;

³ The United States Digital Service, prior to this action, provided consulting services to Federal agencies on improving their use of information technology.

- Decreases the “time to hire,” government-wide, to under 180 days;
- Improves communication with job candidates;
- Integrates modern technology into the recruitment and selection process; and
- Ensures that agency leaders are active participants in implementing the new processes.

This Executive Order also calls for: (1) the Federal hiring plan to include specific agency plans to improve the allocation of Senior Executive Service positions; (2) the plan to provide specific best practices for the human resources function in each agency, which the agencies are to implement; and (3) OPM to establish performance metrics to evaluate the success of the changes provided for in the Order.

Rescission of Previous Executive Orders and Presidential Memoranda

In an [Executive Order](#) titled “Initial Rescissions of Harmful Executive Orders and Actions,” the President rescinded 78 Executive Orders and Presidential Memoranda signed by President Biden. The rescinded actions related to or affecting education and workforce development include:

- Executive Order (EO) 13985: Advancing Racial Equity and Support for Underserved Communities through the Federal Government
- EO 13988: Preventing and Combatting Discrimination on the Basis of Gender Identity or Sexual Orientation
- EO 14000: Supporting the Reopening and Continuing Operation of Schools and Early Childhood Education Providers
- EO 14021: Guaranteeing an Educational Environment Free From Discrimination on the Basis of Sex, Including Sexual Orientation or Gender Identity
- EO 14031: Advancing Equity, Justice, and Opportunity for Asian Americans, Native Hawaiians, and Pacific Islanders
- EO 14045: White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Hispanics
- EO 14049: White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Native Americans and Strengthening Tribal Colleges and Universities

- EO 14050: White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Black Americans
- EO 14075: Advancing Equality for Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex Individuals
- EO 14084: Promoting the Arts, the Humanities, and Museum and Library Services
- EO 14091: Further Advancing Racial Equity and Support for Underserved Communities through the Federal Government
- EO 14094: Modernizing Regulatory Review
- EO 14124: White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity Through Hispanic-Serving Institutions

The Order also provides that, in order to effectuate these rescissions, “the heads of each agency shall take immediate steps to end Federal implementation of unlawful and radical DEI ideology.”