

December 31, 2015

TO: Long Range Planning Committee
Jerry Diamond, Chair
Lynn Dickinson
Kraig Hannum
Church Hinds
Tim Jerman
Karen Luneau
Martha O'Connor

FROM: Jeb Spaulding, Chancellor



RE: Long Range Planning Committee Meeting on January 7, 2016

The Long Range Planning Committee of the VSC Board of Trustees will meet on Thursday, January 7th starting at 9:30 a.m. in conference room 101 of the Office of the Chancellor, 575 Stone Cutters Way, Montpelier. The full agenda and materials are attached.

I can be reached at (802) 224-3036 if you have any questions.

Thank you.

cc: VSC Board of Trustees
Council of Presidents

**VERMONT STATE COLLEGES
BOARD OF TRUSTEES
LONG RANGE PLANNING COMMITTEE MEETING**

**January 7, 2016 at 9:30 a.m.
Office of the Chancellor, Montpelier, VT**

AGENDA

A. ITEMS FOR DISCUSSION AND ACTION

1. Approval of the Minutes of the November 5, 2015 Meeting [Page 3](#)

B. ITEMS FOR INFORMATION AND DISCUSSION

1. Review of proposed strategies to achieve the following [Page 8](#)
Board-approved priorities:
- a. Increase the continuation rate of high school students on to postsecondary education.
 - b. Improve the retention and graduation rates at our colleges and university.
 - c. Become a more attractive destination for Vermont high school graduates.
 - d. Serve well more working age Vermonters.
 - e. Operate as a more integrated system to expand student opportunities and achieve operational efficiencies.
 - f. Increase State financial support and other supplemental revenues.
2. Presidents present strategic analysis of future facilities needs and whether the existing facilities are well matched to meet the changing needs of student bodies and changing teaching methodologies. [Page 11](#)
3. Roundtable discussion with presidents on possible incentives and obstacles to greater collaboration between colleges, consistent with Board-approved vision of one comprehensive and interconnected system comprised of five distinct institutions. [Page 75](#)
4. Discussion of possibilities for greater coordination between JSC and LSC, as well as between CCV and VT Tech. [Page 105](#)
- a. Brainstorm principles to guide future consideration of this topic
5. Date of Next Meeting:
Thursday, February 11, 2016
Office of the Chancellor, Montpelier, VT

Items for Discussion and Action

A. ITEMS FOR DISCUSSION AND ACTION

1. Approval of the Minutes of the November 5, 2015 Meeting

The Vermont State Colleges Board of Trustees Long Range Planning Committee conducted a meeting Thursday, November 5, 2015 at the Office of the Chancellor in Montpelier, Vermont.

Committee members present: Jerry Diamond (Chair), Lynn Dickinson (by phone), Kraig Hannum, Church Hindes, Tim Jerman, Karen Luneau (Vice-Chair), Martha O'Connor

Other Trustees: Jim Masland

From the Chancellor's Office: Elaine Sopchak, Executive Assistant to the Chancellor
Jeb Spaulding, Chancellor
Yasmine Ziesler, Chief Academic & Academic Technology Officer

College Presidents: Joe Bertolino, Elaine Collins, Joyce Judy, Dan Smith (by phone),
Dave Wolk (by phone)

From the Colleges: Tess Conant, VSCUP, Lyndon State College

Chair Diamond called the meeting to order at 1:05 p.m.

A. ITEMS FOR DISCUSSION AND ACTION

1. Approval of the Minutes of the October 8, 2015 Meeting

Trustee Hannum moved and Trustee Jerman seconded the approval of the minutes. The minutes were approved unanimously.

Roll call vote:

Trustee Diamond	Yes
Trustee Hannum	Yes
Trustee Hindes	Yes
Trustee Jerman	Yes
Trustee Luneau	Yes
Trustee Dickinson	Yes

Items for Discussion and Action

Trustee O'Connor informed the Committee that Trustee Pelletier has retired from the Board, and Trustee Dickinson was appointed to be a member of this Committee.

B. ITEMS FOR INFORMATION AND DISCUSSION

1. Revision of VSC Mission, Vision, and Strategic Priorities as well as Metrics to Measure Progress

Chancellor Spaulding introduced Chief Academic Officer Yasmine Ziesler, who briefly explained the suggested revisions to the mission and vision statements. Trustee Hindes remarked that the limited amount of revisions points to the durability of the mission statement as originally written. Dr. Ziesler stated that the suggested revisions reflect shifts in strategic direction the chancellor and Board have been discussing. Trustee Hannum stated that the sixth item in the vision statement will be the focus of the upcoming work of the Board and the system.

Trustee Jerman made a motion to recommend the revised mission and vision statements to the full Board. Trustee Hannum seconded. The motion was approved unanimously.

Roll call vote:

Trustee Diamond	Yes
Trustee Hannum	Yes
Trustee Hindes	Yes
Trustee Jerman	Yes
Trustee Luneau	Yes
Trustee Dickinson	Yes

Chancellor Spaulding shared an example of the work that will be involved in becoming a more interconnected system, describing the nursing programs offered at both Vermont Tech and Castleton. Vermont Tech's program involves online components, while Castleton's program plans to begin offering online delivery combined with low residency. Both colleges have agreed on ways to move forward. Chair Diamond noted that the Board will want to consider whether these kind of somewhat duplicative programs are acceptable. Chancellor Spaulding noted that varying delivery methods provide a layer of complexity to this conversation. As situations arise we will have to work through them case by case.

Chancellor Spaulding handed out to the Committee newly created marketing pieces that promote the programs offered at all of the colleges and highlight pathways into college for high school students.

Items for Discussion and Action

Chancellor Spaulding inquired of the presidents whether and how connected classrooms exist at the colleges. Community College of Vermont President Joyce Judy shared that this already happens between CCV's smaller academic centers. It works and is a viable option. She noted that there are also big differences between online courses offered from school to school and suggested that Board members take an online course to experience it. Connected classrooms are not currently in use at Castleton, Johnson State, or Lyndon State. Vermont Tech has invested in a network of interactive classrooms in multiple sites across the state, and they are exploring sharing the investment with Lyndon State. Vermont Tech also has memoranda of understanding with several tech centers. Its nursing program is based on this model. Chancellor Spaulding suggested that running small courses could be more successful if this functionality could be expanded to Castleton, Johnson, and Lyndon.

The Committee discussed the draft of the system's six strategic priorities. Chair Diamond requested that the language of the newly revised mission be included in the document. Chancellor Spaulding stated that faculty and staff were surveyed because it would be valuable to get their input. The challenge now is to distill the many recommendations into two additional strategies per priority. Trustee Hindes suggested that staff bring a final proposed set of priorities and strategies back to the Committee at its January 7, 2016 meeting. He stated it is remarkable how seriously faculty and staff took the survey and provided constructive ideas. Chancellor Spaulding confirmed that staff will present four strategies for each priority in order to begin creating metrics. The Committee generally agreed on the six priorities presented. Trustee Luneau commended staff for the extent of outreach and response. Chair Diamond requested that staff share the survey responses with faculty.

2. Possible Incentives to Encourage and Support System Collaboration
3. Update on Possible Renaming of the VSC and Survey Responses

Chancellor Spaulding informed the Committee that an article containing inaccuracies regarding the renaming process ran in the Rutland Herald, and was picked up and expanded upon by the AP and consequently other media outlets. He appeared on WDEV to correct the inaccuracies, and VPR ran a subsequent report with more clarity.

Trustee Luneau stated she believes it is worthy of the Committee's time to consider a name change. Trustee Masland stated that the suggested names are not appealing; a new name must be something the Board can really support. Trustee Jerman said the Committee needs to closely study the survey answers. Trustee Hannum said he is still considering whether a name change is necessary. Trustee Dickinson agreed that the names suggested are not appealing. Trustee Hindes stated that the discussion is necessary but must end soon and the Board must make a decision. Chair Diamond shared that he preferred the name Vermont State Colleges. He suggested not

Items for Discussion and Action

changing the name now and see how other work the Board is undertaking succeeds before making a decision to rename.

Chancellor Spaulding agreed that it is not essential to change the name to work on becoming a stronger system, and that none of the names are very appealing. President Smith observed that feedback received does not make it seem like the conversation needs to continue longer. President Judy emphasized that the identity of our institutions is more important than the identity of the system. Chancellor Spaulding noted that even just having the conversation is an opportunity to bring the VSC to the attention of the public. President Collins asked for clarification whether the conversation is about branding the colleges or branding the system. She asked whether rebranding a system is directly relational to increased retention and completion. The chancellor and several trustees stated it is both. President Bertolino stated that rebranding of the message of the system is far more important than changing the name. He suggested the Committee either leave it alone or make a big statement with a new name, but that they must move on. President Wolk observed that the survey responses don't have a critical mass of people who want to change the name. He noted the term "college" is an inclusive term. Trustee Luneau stated that the timing may not be right, and suggested the conversation about renaming happen at the end of the planning and work the Board is beginning to undertake. Chair Diamond will make a recommendation to the Board on the behalf of the Committee to keep the name of the system the same.

Chair Diamond asked that the agenda for the January 7, 2016 meeting include the topic of incentivizing the colleges to collaborate.

4. Update on AGB Consulting Project

President Bertolino updated the Committee on the ongoing AGB consulting project. Rick Beyer of AGB has visited twice each with Castleton, Johnson, Lyndon, and Vermont Tech, and will return in mid November. The meetings have been unique to the colleges and reflected the identity of each institution and its challenges and opportunities. While the challenges are somewhat similar, the solutions may be unique depending on the populations each college serves and the curricula they provide. The third set of meetings will include initial observations, analysis, and recommendations for each of the colleges. A report specific to each college, and a report for chancellor regarding interconnectedness, will be submitted by the winter holidays. A draft will be completed in November. Rick Beyer can be in Vermont on December 3rd and can review the report with the Board at that time.

Items for Discussion and Action

5. Other Business
6. Comments from the Public

There was no other business or comments from the public.

Trustee Luneau made a motion to enter executive session pursuant to 1 V.S.A §313(a)(3) to consider the appointment or employment of a public officer with the understanding that no decision on appointment or employment will be made except in open session. Present in the executive session shall be the Committee members, any present Board members not on the Committee, and the Chancellor. Trustee Hindes seconded the motion.

Roll call vote:

Trustee Diamond	Yes
Trustee Hannum	Yes
Trustee Hindes	Yes
Trustee Jerman	Yes
Trustee Luneau	Yes
Trustee Dickinson	Yes

The decision was unanimous. The Committee entered executive session at 2:57 p.m. The Committee exited executive session at 3:25 p.m. and took no further action.

The meeting adjourned at 3:25 p.m.

B. ITEMS FOR INFORMATION AND DISCUSSION

1. Review of proposed strategies to achieve the following Board-approved priorities:
 - a. Increase the continuation rate of high school students on to postsecondary education.
 - b. Improve the retention and graduation rates at our colleges and university.
 - c. Become a more attractive destination for Vermont high school graduates.
 - d. Serve well more working age Vermonters.
 - e. Operate as a more integrated system to expand student opportunities and achieve operational efficiencies.
 - f. Increase State financial support and other supplemental revenues.

In the fall Chancellor's Office staff surveyed VSC faculty and staff in the fall regarding the above priorities. Chancellor Spaulding discussed the priorities with the Faculty Council for their input as well. Based on this input, the following strategies to achieve each priority are recommended to the Committee for their consideration.

Six Priorities to Support the Mission of the Vermont State Colleges

For the benefit of Vermont, the Vermont State Colleges system provides affordable, high quality, student-centered, and accessible education, fully integrating professional, liberal, and career study, consistent with student aspirations and regional and state needs.

1) Increase the continuation rate of high school students on to postsecondary education.

Strategy 1.a. Provide effective leadership and advocacy, with partners, on the urgent need to increase postsecondary affordability and attainment.

Strategy 1.b. Expand strategies (e.g. Introduction to College Studies, dual enrollment, “try a major” events) targeted at current populations of high school students who are not continuing with postsecondary education.

Strategy 1.c. Expand existing and create additional flexible academic pathways into and through our degree programs, including providing meaningful certificates and associate degrees.

2) Improve the retention and graduation rates at our colleges.

Strategy 2.a. Implement degree maps to create clear curriculum paths to graduation.

Strategy 2.b. Improve access and use of data and advising technologies.

Strategy 2.c. Develop multiple delivery models for degree completion, including online, connected classrooms, and flexible schedule options.

Strategy 2.d. Continue to increase comprehensive and strategic approaches to student support services.

3) Become a more attractive destination for Vermont high school graduates.

Strategy 3.a. Create a positive brand at the VSC system level that supports the unique characteristics of each college.

Strategy 3.b. Continue to improve technological and physical infrastructure.

Strategy 3.c. Enhance relationships with school counselors statewide.

Strategy 3.d. Establish VSC celebration and support of academic excellence (e.g. VSC Hall of Fame).

4) Serve well more working age Vermonters.

Strategy 4.a. Improve and expand flexible and online delivery of programs across the VSC to increase number of degree programs available to students statewide.

Strategy 4.b. Work with employers on needs assessment and flexibility of delivery.

Strategy 4.c. Improve the entire technology infrastructure of the system to ensure that it is user friendly and competitive.

5) Operate as a more integrated system to expand student opportunities and achieve operational efficiencies.

Strategy 5.a. (Also 4c.) Improve the entire technology infrastructure of the system to ensure that it is user friendly and competitive.

Strategy 5.b. Review the financial model of the system to ensure institutional stability and explore financial incentives that support collaboration and system interconnectedness.

Strategy 5.c. Reduce transferability and course-sharing barriers to expand the diversity of student academic and co-curricular learning opportunities.

6) Increase state financial support and other supplemental revenues.

Strategy 6.a. More effectively advocate for state support.

Strategy 6.b. Increase grant-writing capacity in the system.

Strategy 6.c. Collaborate on shared fundraising resources.

Items for Information and Discussion

2. Presidents present strategic analysis of future facilities needs and whether the existing facilities are well matched to meet the changing needs of student bodies and changing teaching methodologies.

The following materials are provided as background for presidential reports on future facilities needs:

- Enrollment trends at residential colleges
- Vermont population study (If readers have limited time, please see page 6, “Scenario A.”)
- State economists’ enrollment and population projection

Enrollment Trends at VSC Residential Colleges

Fall Headcounts

	FALL 2000	FALL 2005	FALL 2010	FALL 2015
CASTLETON	1,598	2,392	2,215	2,246
JOHNSON	1,527	1,866	1,924	1,514
LYNDON	1,214	1,328	1,436	1,266
VT TECH	1,145	1,356	1,656	1,559



Vermont Population Projections – 2010 - 2030

August, 2013

Produced by:

Ken Jones, Ph.D., Economic Research Analyst

Vermont Agency of Commerce and Community Development

and

Lilly Schwarz, Community Based Learning Intern

Montpelier High School

This project was developed with the assistance and oversight of a committee of State Agency representatives. The Committee reviewed the methodology and results leading to the final figures presented in this report.

Population Projection Review Committee

Glenn Bailey, Vermont Agency of Education

Mathew Barewicz, Vermont Department of Labor

Sarah Lindberg, Vermont Department of Financial Regulation

Michael Moser, University of Vermont, Center for Rural

Studies Michael Nyland-Funke, Vermont Department of Health

Vermont Population Projections – 2010 - 2030

How are Population Projections developed?

Vermont's population projections are based on an age cohort model (defined age groupings such as: 35-39 year-olds) using US Census data as the basis for calculations. Mortality, birth rate and migration rate data from 1990-2010 are factors used to develop the projections.

In general, an age cohort projection model starts with the population total for a particular age group at a given point in time. The Census bureau reports most age cohorts in 5 year groups and thus, five year groups are used in this model. At the end of a ten year period, the population for an age cohort is equal to the beginning population total minus the mortality and plus or minus the migration during the ten year period. For example,

In year 2000, according to the US census, Vermont's 25-29 age cohort population was 34,182. Ten years later, in year 2010, Vermont's 35-39 age cohort population was 36,358 - according to Census reporting. Between 2000 and 2010, about 50 people in that age cohort died (0.15% mortality rate over the ten year period).

By taking into account the population increase and mortality rate for the the age cohort, the migration rate can be calculated.

$$\begin{aligned} \text{Migration} &= 36,358 - 34,182 + 50 \\ &= 2226 \text{ or } 6.51\% \text{ of the 2000 five year age cohort} \end{aligned}$$

"Projecting" into the future, would suggest that the 2020 population of 35-39 year olds will equal the 2010 population of 25-29 year olds (35,441) minus mortality (again, about .15%) plus the 6.51% net migration rate. 2020 projected population of 35-39 year olds = 37,700

Migration

The migration rate for the 2010 to 2020 and 2020 to 2030 decades could be similar to the migration rate for the 2000 to 2010 period or the 1990 to 2000 period. These different migration assumptions are the basis for the two sets of projections presented in this report – Scenario A and Scenario B. In Vermont, there is a relationship between the national economy and the direction and magnitude of migration. During the 1990s (Scenario A), the national economy was generally healthier than during the 2000s (Scenario B) and Vermont saw greater rates of net in-migration. As a result, Scenario A using 1990s migration rates generally, show higher populations than Scenario B using the migration rates of the 2000s.

Mortality

The mortality rates for age cohorts greater than 50 years old continue to decrease. For the population projections, we use mortality rates that continue the decline. For younger populations, the mortality rate is leveling off and the mortality rates used for the projection do not have the same proportional decreases that other age cohorts exhibit.

Births

The number of children born during the projection period requires the use of age specific birth rates. The Vermont Department of Health publishes county and age-specific birth rates each year in its Vital Statistics publication. In Vermont, each county is witnessing decreases in the birth rates for teenage women. Birth rates for women in their 20s and early 30s are relatively more stable, while the birth rates for women in older age cohorts continue to increase. As with the mortality rates, these Vermont population projections assume a continuation in the trend in birth rates seen for the past twenty years to provide birth rates for each age cohort into the next twenty years. Unlike mortality, the birth rates in Vermont vary significantly for each county. Therefore, the county projections use county-specific birth rates for each age cohort.

In order to complete the projections for children born during the projection period, there are three steps. The first step is to complete the population projections for females in each county using statewide mortality rates and county and age specific migration rates based on 1990s and 2000s Census data. The second step is to apply the age and county specific birth rates to each projected female age cohort resulting in the number of births during the time period. The final step is to review the migration rates for young children during the 1990s and 2000s and apply those migration rates to the number of births projected from Steps One and Two.

Normalizing the county and town projections

For all age cohorts, a state projection is completed in addition to one for each county. Because the statistical validity of a projection is greater with larger numbers, the state projection serves as a base against which the county projections are normalized. In other words, for any age cohort, the state projected total is compared against the total of each county cohort. Any differences are normalized by reducing or increasing county figures proportionally to the population size of that cohort in each county. For example, the age 40-44 state population is projected to be 35,561 when assuming the migration pattern of the 2000s. The sum of the county projections for that cohort is 35,570. For consistency, the county population numbers for that cohort are decreased proportionally to result in a county total equal to the state projected figure.

Town and City projections

The county projections are the basis for determining town and city level projections. As with the county migration rates, the changes in the population for each town that took place in 2000-2010 and 1990 – 2000 combined with the projected changes in county numbers result in an equation to project town populations. Specifically,

2020 Town projected figure = Town population in 2010 + (50% of the rate of town population change from 2000-2010) + (25% of the rate of town population change from 1990 – 2000) + (25% of the rate of county population change from 2000-2010)

2030 Town projected figure = Town population in 2020 + (35% the rate of town population change from 2000-2010)+(15% of the rate of town population change from 1990 – 2000) + (50% of the rate of county population change from 2000-2010)

Similar to normalizing county age cohort figures to correspond to the state projections, town populations are either increased or decreased to assure that the sum of the town populations in a county equal the county population.

Caveats when considering the Vermont Population Projections

Projections, not predictions

Projections assume that conditions that occurred in the past will continue into the future. For these projections, there are assumptions about mortality rates (continuing a downward trajectory for the next 20 years), birth rates and two sets of assumptions about migration rates. Events may alter the conditions that led to population changes in the past 20 years and those events will affect the changes in population. Examples of changes that are not predicted for these estimates:

- Changes in the birth rate from social changes different than what has occurred in the past 20 years
- Changes in health care practices or epidemics that could affect mortality rates
- Changing economic conditions that result in shifts in national (internal) migration
- Changes in national immigration policies

Census populations, not the actual number of inhabitants at a given time

Many individuals, particularly those that are retired and those attending colleges and universities have more than one home. The Census Bureau does not have a requirement that individuals determine their residency with a particular set of standards and does not allow any individual to split their residence to multiple towns or states. The residence as of April 1, in the

year the Census is conducted is a standard upon which many people determine their census filing “home”.

In Vermont, individuals that reside in other states such as “snow bird” destinations in the southern United States may not file their Census return from Vermont and yet may be registered to vote in Vermont, hold a Vermont driver’s license, pay taxes or even live the majority of the year in Vermont. Because the Census does not capture the true nature of these residents, the projections may give a misleading estimate on how many individuals reside in a particular community during different times of the year.

Statistical limitations

When working with relatively small population sizes, data can be susceptible to fluctuations that may not represent trends, but rather individual, non-replicable events. The margin of error for any statistical calculation increases as the size of the population decreases. These small numbers are evident in some of the small county age cohort projections as well as small town populations.

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Vermont Total					
<5	31,952	30,854	-3.4%	30,065	-5.9%
5-9	34,654	32,843	-5.2%	33,318	-3.9%
10-14	37,637	35,160	-6.6%	33,948	-9.8%
15-19	46,012	37,972	-17.5%	35,990	-21.8%
20-24	43,851	37,585	-14.3%	35,121	-19.9%
25-29	35,441	37,776	6.6%	31,187	-12.0%
30-34	34,181	40,774	19.3%	34,959	2.3%
35-39	36,358	38,681	6.4%	41,240	13.4%
40-44	42,001	35,942	-14.4%	42,893	2.1%
45-49	50,110	37,227	-25.7%	39,633	-20.9%
50-54	52,493	42,566	-18.9%	36,466	-30.5%
55-59	48,739	50,796	4.2%	37,839	-22.4%
60-64	41,234	53,183	29.0%	43,349	5.1%
65-69	29,390	47,672	62.2%	50,168	70.7%
70-74	20,148	38,677	92.0%	50,579	151.0%
75-79	15,960	24,908	56.1%	40,910	156.3%
80-84	12,783	14,802	15.8%	28,701	124.5%
85+	12,797	16,157	26.3%	23,707	85.3%
Total	625,741	653,575	4.4%	670,073	7.1%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Addison County					
<5	1,772	1,416	-20.1%	1,287	-27.4%
5-9	1,923	1,574	-18.1%	1,499	-22.0%
10-14	2,246	1,903	-15.3%	1,506	-32.9%
15-19	3,286	2,576	-21.6%	2,101	-36.1%
20-24	3,069	2,745	-10.6%	2,325	-24.2%
25-29	1,624	1,853	14.1%	1,447	-10.9%
30-34	1,778	2,380	33.9%	2,134	20.0%
35-39	2,051	1,867	-9.0%	2,131	3.9%
40-44	2,508	1,853	-26.1%	2,486	-0.9%
45-49	2,968	2,121	-28.5%	1,936	-34.8%
50-54	3,057	2,481	-18.8%	1,835	-40.0%
55-59	2,932	2,970	1.3%	2,129	-27.4%
60-64	2,505	3,196	27.6%	2,607	4.1%
65-69	1,703	2,816	65.4%	2,877	68.9%
70-74	1,123	2,355	109.7%	3,046	171.2%
75-79	849	1,411	66.2%	2,359	177.9%
80-84	704	808	14.8%	1,710	142.9%
85+	723	873	20.7%	1,315	81.9%
Total	36,821	37,198	1.0%	36,730	-0.2%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Bennington County					
<5	1,877	1,861	-0.9%	1,642	-12.5%
5-9	1,990	1,972	-0.9%	1,869	-6.1%
10-14	2,147	1,964	-8.5%	1,932	-10.0%
15-19	2,678	1,929	-28.0%	1,905	-28.9%
20-24	2,133	1,697	-20.4%	1,551	-27.3%
25-29	1,751	1,924	9.9%	1,380	-21.2%
30-34	1,641	1,914	16.6%	1,526	-7.0%
35-39	1,872	1,868	-0.2%	2,054	9.7%
40-44	2,410	1,718	-28.7%	2,007	-16.7%
45-49	2,942	1,922	-34.7%	1,922	-34.7%
50-54	3,099	2,526	-18.5%	1,802	-41.9%
55-59	2,922	3,112	6.5%	2,040	-30.2%
60-64	2,668	3,282	23.0%	2,687	0.7%
65-69	2,065	3,054	47.9%	3,279	58.8%
70-74	1,497	2,761	84.4%	3,444	130.1%
75-79	1,293	1,734	34.1%	2,596	100.8%
80-84	1,075	1,135	5.6%	2,114	96.7%
85+	1,065	1,322	24.1%	1,720	61.5%
Total	37,125	37,695	1.5%	37,470	0.9%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Caledonia County					
<5	1,727	1,581	-8.5%	1,434	-17.0%
5-9	1,843	1,622	-12.0%	1,614	-12.4%
10-14	1,894	1,999	5.5%	1,847	-2.5%
15-19	2,404	2,016	-16.1%	1,768	-26.5%
20-24	1,957	1,438	-26.5%	1,517	-22.5%
25-29	1,588	1,676	5.5%	1,399	-11.9%
30-34	1,627	1,887	16.0%	1,391	-14.5%
35-39	1,810	1,752	-3.2%	1,850	2.2%
40-44	1,875	1,769	-5.7%	2,056	9.7%
45-49	2,390	1,980	-17.2%	1,920	-19.7%
50-54	2,501	1,949	-22.1%	1,840	-26.4%
55-59	2,654	2,401	-9.5%	1,996	-24.8%
60-64	2,164	2,622	21.2%	2,053	-5.1%
65-69	1,504	2,587	72.0%	2,361	57.0%
70-74	1,039	2,110	103.1%	2,591	149.4%
75-79	829	1,335	61.0%	2,318	179.6%
80-84	724	769	6.2%	1,579	118.1%
85+	697	843	20.9%	1,218	74.7%
Total	31,227	32,336	3.6%	32,752	4.9%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Chittenden County					
<5	7,877	8,308	5.5%	7,660	-2.8%
5-9	8,479	8,701	2.6%	8,006	-5.6%
10-14	8,958	8,392	-6.3%	8,585	-4.2%
15-19	13,714	11,233	-18.1%	11,484	-16.3%
20-24	16,462	14,700	-10.7%	13,763	-16.4%
25-29	11,061	12,432	12.4%	10,140	-8.3%
30-34	9,551	12,102	26.7%	10,836	13.5%
35-39	9,291	11,218	20.7%	12,616	35.8%
40-44	10,608	9,711	-8.5%	12,329	16.2%
45-49	11,956	9,230	-22.8%	11,168	-6.6%
50-54	12,340	10,045	-18.6%	9,205	-25.4%
55-59	10,343	10,952	5.9%	8,483	-18.0%
60-64	8,220	10,909	32.7%	8,922	8.5%
65-69	5,609	9,115	62.5%	9,732	73.5%
70-74	3,823	7,379	93.0%	9,925	159.6%
75-79	3,099	4,805	55.1%	7,904	155.1%
80-84	2,563	3,006	17.3%	5,870	129.0%
85+	2,591	3,452	33.2%	5,090	96.4%
Total	156,545	165,690	5.8%	171,718	9.7%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Essex County					
<5	254	186	-26.8%	187	-26.4%
5-9	306	247	-19.3%	276	-9.8%
10-14	380	309	-18.7%	231	-39.2%
15-19	378	286	-24.3%	230	-39.2%
20-24	278	198	-28.8%	160	-42.4%
25-29	258	266	3.1%	200	-22.5%
30-34	267	408	52.8%	290	8.6%
35-39	352	302	-14.2%	311	-11.6%
40-44	437	261	-40.3%	400	-8.5%
45-49	515	349	-32.2%	300	-41.7%
50-54	582	412	-29.2%	247	-57.6%
55-59	557	509	-8.6%	346	-37.9%
60-64	522	588	12.6%	418	-19.9%
65-69	421	507	20.4%	467	10.9%
70-74	281	466	65.8%	532	89.3%
75-79	242	308	27.3%	375	55.0%
80-84	161	173	7.5%	290	80.1%
85+	115	174	51.3%	229	99.1%
Total	6,306	5,949	-5.7%	5,489	-13.0%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Franklin County					
<5	3,007	2,928	-2.6%	3,155	4.9%
5-9	3,129	3,033	-3.1%	3,433	9.7%
10-14	3,495	3,343	-4.3%	3,318	-5.1%
15-19	3,225	2,899	-10.1%	2,799	-13.2%
20-24	2,355	2,298	-2.4%	2,197	-6.7%
25-29	2,770	3,007	8.6%	2,691	-2.9%
30-34	2,944	3,360	14.1%	3,288	11.7%
35-39	3,271	3,304	1.0%	3,589	9.7%
40-44	3,605	3,118	-13.5%	3,568	-1.0%
45-49	4,069	3,338	-18.0%	3,378	-17.0%
50-54	3,946	3,646	-7.6%	3,156	-20.0%
55-59	3,429	4,224	23.2%	3,476	1.4%
60-64	2,693	4,017	49.2%	3,729	38.5%
65-69	1,940	3,351	72.7%	4,163	114.6%
70-74	1,272	2,526	98.6%	3,820	200.3%
75-79	1,051	1,604	52.6%	2,806	167.0%
80-84	825	851	3.2%	1,708	107.0%
85+	720	963	33.8%	1,373	90.7%
Total	47,746	51,810	8.5%	55,647	16.5%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Grand Isle County					
<5	319	435	36.4%	569	78.4%
5-9	370	447	20.8%	603	63.0%
10-14	441	423	-4.1%	577	30.8%
15-19	420	381	-9.3%	459	9.3%
20-24	300	307	2.3%	294	-2.0%
25-29	307	408	32.9%	369	20.2%
30-34	366	476	30.1%	488	33.3%
35-39	408	449	10.0%	598	46.6%
40-44	497	463	-6.8%	604	21.5%
45-49	628	506	-19.4%	559	-11.0%
50-54	667	645	-3.3%	602	-9.7%
55-59	691	848	22.7%	687	-0.6%
60-64	577	944	63.6%	917	58.9%
65-69	378	876	131.7%	1,085	187.0%
70-74	252	534	111.9%	885	251.2%
75-79	159	347	118.2%	812	410.7%
80-84	111	160	44.1%	343	209.0%
85+	79	128	62.0%	257	225.3%
Total	6,970	8,777	25.9%	10,708	53.6%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Lamoille County					
<5	1,495	1,479	-1.1%	1,557	4.1%
5-9	1,467	1,617	10.2%	1,729	17.9%
10-14	1,509	1,723	14.2%	1,709	13.3%
15-19	1,773	1,696	-4.3%	1,862	5.0%
20-24	1,572	1,696	7.9%	1,935	23.1%
25-29	1,351	1,728	27.9%	1,646	21.8%
30-34	1,550	1,587	2.4%	1,717	10.8%
35-39	1,620	1,543	-4.8%	1,975	21.9%
40-44	1,669	1,705	2.2%	1,750	4.9%
45-49	1,951	1,765	-9.5%	1,684	-13.7%
50-54	2,013	1,816	-9.8%	1,856	-7.8%
55-59	1,743	2,201	26.3%	1,998	14.6%
60-64	1,498	2,269	51.5%	2,056	37.2%
65-69	1,110	1,854	67.0%	2,361	112.7%
70-74	763	1,434	87.9%	2,203	188.7%
75-79	566	951	68.0%	1,609	184.3%
80-84	429	560	30.5%	1,063	147.8%
85+	396	574	44.9%	929	134.6%
Total	24,475	28,198	15.2%	31,639	29.3%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Orange County					
<5	1,472	1,251	-15.0%	1,292	-12.2%
5-9	1,623	1,274	-21.5%	1,400	-13.7%
10-14	1,786	1,698	-4.9%	1,472	-17.6%
15-19	1,982	1,670	-15.7%	1,306	-34.1%
20-24	1,551	1,203	-22.4%	1,143	-26.3%
25-29	1,496	1,427	-4.6%	1,197	-20.0%
30-34	1,476	1,715	16.2%	1,334	-9.6%
35-39	1,652	1,745	5.6%	1,665	0.8%
40-44	1,943	1,618	-16.7%	1,883	-3.1%
45-49	2,420	1,721	-28.9%	1,822	-24.7%
50-54	2,671	2,030	-24.0%	1,692	-36.7%
55-59	2,435	2,590	6.4%	1,848	-24.1%
60-64	2,153	2,792	29.7%	2,132	-1.0%
65-69	1,455	2,462	69.2%	2,640	81.4%
70-74	976	2,038	108.8%	2,680	174.6%
75-79	779	1,211	55.5%	2,071	165.9%
80-84	555	685	23.4%	1,444	160.2%
85+	511	683	33.7%	1,035	102.5%
Total	28,936	29,813	3.0%	30,056	3.9%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Orleans County					
<5	1,413	1,206	-14.6%	1,136	-19.6%
5-9	1,576	1,278	-18.9%	1,342	-14.8%
10-14	1,714	1,663	-3.0%	1,451	-15.3%
15-19	1,677	1,472	-12.2%	1,189	-29.1%
20-24	1,385	1,090	-21.3%	1,057	-23.7%
25-29	1,455	1,331	-8.5%	1,164	-20.0%
30-34	1,495	1,674	12.0%	1,321	-11.6%
35-39	1,598	1,738	8.8%	1,592	-0.4%
40-44	1,747	1,659	-5.0%	1,861	6.5%
45-49	2,062	1,675	-18.8%	1,826	-11.4%
50-54	2,128	1,848	-13.2%	1,756	-17.5%
55-59	2,183	2,302	5.5%	1,876	-14.1%
60-64	1,974	2,393	21.2%	2,089	5.8%
65-69	1,595	2,307	44.6%	2,453	53.8%
70-74	1,070	1,905	78.0%	2,343	119.0%
75-79	780	1,364	74.9%	1,996	155.9%
80-84	673	827	22.9%	1,485	120.7%
85+	706	866	22.7%	1,359	92.5%
Total	27,231	28,598	5.0%	29,296	7.6%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Rutland County					
<5	2,832	2,482	-12.4%	2,183	-22.9%
5-9	3,208	2,595	-19.1%	2,424	-24.4%
10-14	3,552	3,059	-13.9%	2,681	-24.5%
15-19	4,246	3,325	-21.7%	2,679	-36.9%
20-24	4,081	3,070	-24.8%	2,642	-35.3%
25-29	3,133	3,004	-4.1%	2,342	-25.2%
30-34	2,973	3,684	23.9%	2,779	-6.5%
35-39	3,328	3,297	-0.9%	3,164	-4.9%
40-44	4,059	2,945	-27.4%	3,657	-9.9%
45-49	5,068	3,327	-34.4%	3,303	-34.8%
50-54	5,330	4,089	-23.3%	2,970	-44.3%
55-59	5,118	5,180	1.2%	3,412	-33.3%
60-64	4,457	5,417	21.5%	4,175	-6.3%
65-69	3,280	4,982	51.9%	5,085	55.0%
70-74	2,279	4,181	83.5%	5,153	126.1%
75-79	1,807	2,721	50.6%	4,182	131.4%
80-84	1,450	1,668	15.0%	3,092	113.2%
85+	1,441	1,765	22.5%	2,516	74.6%
Total	61,642	60,791	-1.4%	58,439	-5.2%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Washington County					
<5	3,087	2,999	-2.9%	3,140	1.7%
5-9	3,366	3,249	-3.5%	3,498	3.9%
10-14	3,542	3,339	-5.7%	3,297	-6.9%
15-19	4,146	3,421	-17.5%	3,290	-20.6%
20-24	3,597	3,226	-10.3%	3,040	-15.5%
25-29	3,085	3,351	8.6%	2,753	-10.8%
30-34	3,342	3,678	10.1%	3,308	-1.0%
35-39	3,690	3,518	-4.7%	3,825	3.7%
40-44	4,211	3,615	-14.2%	3,987	-5.3%
45-49	4,760	3,777	-20.7%	3,609	-24.2%
50-54	5,096	4,234	-16.9%	3,638	-28.6%
55-59	4,810	4,627	-3.8%	3,683	-23.4%
60-64	4,185	4,855	16.0%	4,054	-3.1%
65-69	2,654	4,448	67.6%	4,316	62.6%
70-74	1,952	3,668	87.9%	4,315	121.1%
75-79	1,554	2,216	42.6%	3,750	141.3%
80-84	1,160	1,421	22.5%	2,700	132.8%
85+	1,297	1,544	19.0%	2,169	67.2%
Total	59,534	61,186	2.8%	62,372	4.8%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Windham County					
<5	2,148	2,122	-1.2%	2,133	-0.7%
5-9	2,347	2,341	-0.3%	2,477	5.5%
10-14	2,624	2,292	-12.7%	2,301	-12.3%
15-19	2,839	2,253	-20.6%	2,238	-21.2%
20-24	2,513	1,880	-25.2%	1,641	-34.7%
25-29	2,378	2,432	2.3%	1,921	-19.2%
30-34	2,258	2,768	22.6%	2,077	-8.0%
35-39	2,337	2,570	10.0%	2,630	12.5%
40-44	2,846	2,394	-15.9%	2,941	3.3%
45-49	3,703	2,368	-36.1%	2,610	-29.5%
50-54	3,994	2,980	-25.4%	2,509	-37.2%
55-59	3,989	3,895	-2.4%	2,499	-37.4%
60-64	3,370	4,396	30.4%	3,295	-2.2%
65-69	2,395	4,104	71.4%	4,041	68.7%
70-74	1,572	3,213	104.4%	4,249	170.3%
75-79	1,234	2,043	65.6%	3,539	186.8%
80-84	985	1,152	17.0%	2,376	141.2%
85+	981	1,274	29.9%	1,952	99.0%
Total	44,513	46,477	4.4%	47,429	6.6%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario A

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Windsor County					
<5	2,672	2,600	-2.7%	2,690	0.7%
5-9	3,027	2,893	-4.4%	3,148	4.0%
10-14	3,349	3,053	-8.8%	3,041	-9.2%
15-19	3,244	2,815	-13.2%	2,680	-17.4%
20-24	2,598	2,037	-21.6%	1,856	-28.6%
25-29	3,184	2,937	-7.8%	2,538	-20.3%
30-34	2,913	3,141	7.8%	2,470	-15.2%
35-39	3,078	3,510	14.0%	3,240	5.3%
40-44	3,586	3,113	-13.2%	3,364	-6.2%
45-49	4,678	3,148	-32.7%	3,596	-23.1%
50-54	5,069	3,865	-23.8%	3,358	-33.8%
55-59	4,933	4,985	1.1%	3,366	-31.8%
60-64	4,248	5,503	29.5%	4,215	-0.8%
65-69	3,281	5,209	58.8%	5,308	61.8%
70-74	2,249	4,107	82.6%	5,393	139.8%
75-79	1,718	2,858	66.4%	4,593	167.3%
80-84	1,368	1,587	16.0%	2,927	114.0%
85+	1,475	1,696	15.0%	2,545	72.5%
Total	56,670	59,057	4.2%	60,328	6.5%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Vermont Total					
<5	31,952	29,478	-7.7%	27,844	-12.9%
5-9	34,654	31,532	-9.0%	31,184	-10.0%
10-14	37,637	35,328	-6.1%	32,711	-13.1%
15-19	46,012	38,773	-15.7%	35,282	-23.3%
20-24	43,851	36,381	-17.0%	34,158	-22.1%
25-29	35,441	35,576	0.4%	29,991	-15.4%
30-34	34,181	39,619	15.9%	32,882	-3.8%
35-39	36,358	37,700	3.7%	37,854	4.1%
40-44	42,001	35,561	-15.3%	41,237	-1.8%
45-49	50,110	36,934	-26.3%	38,325	-23.5%
50-54	52,493	42,060	-19.9%	35,650	-32.1%
55-59	48,739	48,945	0.4%	36,174	-25.8%
60-64	41,234	49,902	21.0%	40,192	-2.5%
65-69	29,390	44,530	51.5%	45,157	53.6%
70-74	20,148	34,891	73.2%	42,820	112.5%
75-79	15,960	22,725	42.4%	34,869	118.5%
80-84	12,783	13,503	5.6%	23,623	84.8%
85+	12,797	15,250	19.2%	20,527	60.4%
Total	625,741	628,688	0.5%	620,480	-0.8%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Addison County					
<5	1,772	1,358	-23.4%	1,140	-35.7%
5-9	1,923	1,467	-23.7%	1,354	-29.6%
10-14	2,246	1,930	-14.1%	1,499	-33.3%
15-19	3,286	2,486	-24.3%	1,891	-42.5%
20-24	3,069	2,588	-15.7%	2,229	-27.4%
25-29	1,624	1,528	-5.9%	1,153	-29.0%
30-34	1,778	1,927	8.4%	1,630	-8.3%
35-39	2,051	1,971	-3.9%	1,872	-8.7%
40-44	2,508	1,954	-22.1%	2,124	-15.3%
45-49	2,968	2,200	-25.9%	2,118	-28.6%
50-54	3,057	2,600	-14.9%	2,029	-33.6%
55-59	2,932	2,907	-0.9%	2,161	-26.3%
60-64	2,505	3,002	19.8%	2,568	2.5%
65-69	1,703	2,709	59.1%	2,716	59.5%
70-74	1,123	2,197	95.6%	2,672	137.9%
75-79	849	1,363	60.5%	2,192	158.2%
80-84	704	759	7.8%	1,497	112.6%
85+	723	874	20.9%	1,268	75.4%
Total	36,821	35,820	-2.7%	34,113	-7.4%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Bennington County					
<5	1,877	1,631	-13.1%	1,366	-27.2%
5-9	1,990	1,852	-6.9%	1,689	-15.1%
10-14	2,147	2,091	-2.6%	1,826	-15.0%
15-19	2,678	2,185	-18.4%	2,028	-24.3%
20-24	2,133	1,654	-22.5%	1,615	-24.3%
25-29	1,751	1,779	1.6%	1,448	-17.3%
30-34	1,641	1,867	13.8%	1,452	-11.5%
35-39	1,872	1,864	-0.4%	1,911	2.1%
40-44	2,410	1,847	-23.4%	2,108	-12.5%
45-49	2,942	1,977	-32.8%	1,971	-33.0%
50-54	3,099	2,475	-20.1%	1,900	-38.7%
55-59	2,922	2,966	1.5%	1,999	-31.6%
60-64	2,668	3,098	16.1%	2,488	-6.7%
65-69	2,065	2,820	36.6%	2,895	40.2%
70-74	1,497	2,340	56.3%	2,760	84.4%
75-79	1,293	1,709	32.2%	2,365	82.9%
80-84	1,075	989	-8.0%	1,560	45.1%
85+	1,065	1,326	24.5%	1,653	55.2%
Total	37,125	36,470	-1.8%	35,034	-5.6%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Caledonia County					
<5	1,727	1,576	-8.7%	1,464	-15.2%
5-9	1,843	1,652	-10.4%	1,686	-8.5%
10-14	1,894	2,002	5.7%	1,849	-2.4%
15-19	2,404	2,213	-7.9%	1,978	-17.7%
20-24	1,957	1,522	-22.2%	1,613	-17.6%
25-29	1,588	1,576	-0.8%	1,447	-8.9%
30-34	1,627	1,916	17.8%	1,496	-8.1%
35-39	1,810	1,875	3.6%	1,878	3.8%
40-44	1,875	1,760	-6.1%	2,079	10.9%
45-49	2,390	1,978	-17.2%	2,052	-14.1%
50-54	2,501	2,000	-20.0%	1,880	-24.8%
55-59	2,654	2,505	-5.6%	2,080	-21.6%
60-64	2,164	2,451	13.3%	1,972	-8.9%
65-69	1,504	2,616	73.9%	2,498	66.1%
70-74	1,039	1,906	83.4%	2,191	110.9%
75-79	829	1,200	44.8%	2,108	154.3%
80-84	724	684	-5.5%	1,267	75.0%
85+	697	767	10.0%	996	42.9%
Total	31,227	32,199	3.1%	32,534	4.2%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Chittenden County					
<5	7,877	8,293	5.3%	7,431	-5.7%
5-9	8,479	8,171	-3.6%	7,153	-15.6%
10-14	8,958	8,295	-7.4%	8,395	-6.3%
15-19	13,714	11,572	-15.6%	11,119	-18.9%
20-24	16,462	14,236	-13.5%	13,215	-19.7%
25-29	11,061	12,688	14.7%	10,675	-3.5%
30-34	9,551	11,992	25.6%	10,405	8.9%
35-39	9,291	10,043	8.1%	11,627	25.1%
40-44	10,608	9,273	-12.6%	11,678	10.1%
45-49	11,956	8,771	-26.6%	9,497	-20.6%
50-54	12,340	10,046	-18.6%	8,796	-28.7%
55-59	10,343	10,998	6.3%	8,093	-21.8%
60-64	8,220	10,872	32.3%	8,901	8.3%
65-69	5,609	8,910	58.9%	9,578	70.8%
70-74	3,823	6,812	78.2%	9,143	139.2%
75-79	3,099	4,505	45.4%	7,247	133.8%
80-84	2,563	2,851	11.2%	5,133	100.3%
85+	2,591	3,484	34.5%	4,881	88.4%
Total	156,545	161,812	3.4%	162,967	4.1%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Essex County					
<5	254	142	-44.1%	111	-56.3%
5-9	306	194	-36.6%	181	-40.8%
10-14	380	276	-27.4%	162	-57.4%
15-19	378	250	-33.9%	158	-58.2%
20-24	278	191	-31.3%	139	-50.0%
25-29	258	210	-18.6%	138	-46.5%
30-34	267	279	4.5%	193	-27.7%
35-39	352	301	-14.5%	247	-29.8%
40-44	437	274	-37.3%	287	-34.3%
45-49	515	350	-32.0%	300	-41.7%
50-54	582	497	-14.6%	312	-46.4%
55-59	557	597	7.2%	407	-26.9%
60-64	522	669	28.2%	574	10.0%
65-69	421	572	35.9%	620	47.3%
70-74	281	501	78.3%	652	132.0%
75-79	242	333	37.6%	459	89.7%
80-84	161	179	11.2%	322	100.0%
85+	115	159	38.3%	218	89.6%
Total	6,306	5,974	-5.3%	5,480	-13.1%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Franklin County					
<5	3,007	2,825	-6.1%	3,077	2.3%
5-9	3,129	2,853	-8.8%	3,278	4.8%
10-14	3,495	3,260	-6.7%	3,151	-9.8%
15-19	3,225	2,767	-14.2%	2,516	-22.0%
20-24	2,355	2,180	-7.4%	2,039	-13.4%
25-29	2,770	2,749	-0.8%	2,352	-15.1%
30-34	2,944	3,268	11.0%	3,035	3.1%
35-39	3,271	3,373	3.1%	3,379	3.3%
40-44	3,605	3,024	-16.1%	3,369	-6.5%
45-49	4,069	3,261	-19.9%	3,368	-17.2%
50-54	3,946	3,579	-9.3%	3,006	-23.8%
55-59	3,429	4,026	17.4%	3,236	-5.6%
60-64	2,693	3,714	37.9%	3,387	25.8%
65-69	1,940	3,042	56.8%	3,611	86.1%
70-74	1,272	2,183	71.6%	3,056	140.3%
75-79	1,051	1,458	38.7%	2,317	120.5%
80-84	825	815	-1.2%	1,413	71.3%
85+	720	876	21.7%	1,149	59.6%
Total	47,746	49,253	3.2%	50,739	6.3%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Grand Isle County					
<5	319	241	-24.5%	264	-17.2%
5-9	370	247	-33.2%	280	-24.3%
10-14	441	366	-17.0%	289	-34.5%
15-19	420	344	-18.1%	228	-45.7%
20-24	300	231	-23.0%	193	-35.7%
25-29	307	289	-5.9%	236	-23.1%
30-34	366	414	13.1%	321	-12.3%
35-39	408	406	-0.5%	386	-5.4%
40-44	497	413	-16.9%	469	-5.6%
45-49	628	435	-30.7%	433	-31.1%
50-54	667	514	-22.9%	428	-35.8%
55-59	691	684	-1.0%	475	-31.3%
60-64	577	722	25.1%	560	-2.9%
65-69	378	592	56.6%	593	56.9%
70-74	252	434	72.2%	552	119.0%
75-79	159	214	34.6%	339	113.2%
80-84	111	135	21.6%	235	111.7%
85+	79	92	16.5%	124	57.0%
Total	6,970	6,773	-2.8%	6,405	-8.1%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Lamoille County					
<5	1,495	1,315	-12.0%	1,254	-16.1%
5-9	1,467	1,489	1.5%	1,492	1.7%
10-14	1,509	1,751	16.0%	1,568	3.9%
15-19	1,773	1,574	-11.2%	1,594	-10.1%
20-24	1,572	1,376	-12.5%	1,600	1.8%
25-29	1,351	1,399	3.6%	1,239	-8.3%
30-34	1,550	1,529	-1.4%	1,343	-13.4%
35-39	1,620	1,423	-12.2%	1,487	-8.2%
40-44	1,669	1,696	1.6%	1,679	0.6%
45-49	1,951	1,662	-14.8%	1,463	-25.0%
50-54	2,013	1,702	-15.4%	1,732	-14.0%
55-59	1,743	1,853	6.3%	1,584	-9.1%
60-64	1,498	1,852	23.6%	1,575	5.1%
65-69	1,110	1,578	42.2%	1,696	52.8%
70-74	763	1,230	61.2%	1,544	102.4%
75-79	566	841	48.6%	1,212	114.1%
80-84	429	529	23.3%	861	100.7%
85+	396	482	21.7%	695	75.5%
Total	24,475	25,281	3.3%	25,618	4.7%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Orange County					
<5	1,472	1,202	-18.3%	1,210	-17.8%
5-9	1,623	1,361	-16.1%	1,494	-7.9%
10-14	1,786	1,651	-7.6%	1,391	-22.1%
15-19	1,982	1,673	-15.6%	1,400	-29.4%
20-24	1,551	1,181	-23.9%	1,094	-29.5%
25-29	1,496	1,320	-11.8%	1,111	-25.7%
30-34	1,476	1,665	12.8%	1,272	-13.8%
35-39	1,652	1,745	5.6%	1,554	-5.9%
40-44	1,943	1,734	-10.8%	1,962	1.0%
45-49	2,420	1,742	-28.0%	1,843	-23.8%
50-54	2,671	2,007	-24.9%	1,794	-32.8%
55-59	2,435	2,522	3.6%	1,821	-25.2%
60-64	2,153	2,725	26.6%	2,059	-4.4%
65-69	1,455	2,293	57.6%	2,401	65.0%
70-74	976	1,811	85.6%	2,328	138.5%
75-79	779	1,084	39.2%	1,728	121.8%
80-84	555	609	9.7%	1,139	105.2%
85+	511	621	21.5%	842	64.8%
Total	28,936	28,946	0.0%	28,443	-1.7%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Orleans County					
<5	1,413	1,090	-22.9%	1,007	-28.7%
5-9	1,576	1,237	-21.5%	1,278	-18.9%
10-14	1,714	1,622	-5.4%	1,291	-24.7%
15-19	1,677	1,508	-10.1%	1,181	-29.6%
20-24	1,385	1,141	-17.6%	1,083	-21.8%
25-29	1,455	1,281	-12.0%	1,149	-21.0%
30-34	1,495	1,620	8.4%	1,339	-10.4%
35-39	1,598	1,712	7.1%	1,521	-4.8%
40-44	1,747	1,571	-10.1%	1,708	-2.2%
45-49	2,062	1,704	-17.4%	1,827	-11.4%
50-54	2,128	1,779	-16.4%	1,602	-24.7%
55-59	2,183	2,102	-3.7%	1,741	-20.2%
60-64	1,974	2,271	15.0%	1,909	-3.3%
65-69	1,595	2,241	40.5%	2,182	36.8%
70-74	1,070	1,765	65.0%	2,063	92.8%
75-79	780	1,225	57.1%	1,742	123.3%
80-84	673	748	11.1%	1,242	84.5%
85+	706	807	14.3%	1,143	61.9%
Total	27,231	27,424	0.7%	27,008	-0.8%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Rutland County					
<5	2,832	2,286	-19.3%	1,922	-32.1%
5-9	3,208	2,600	-19.0%	2,347	-26.8%
10-14	3,552	3,065	-13.7%	2,493	-29.8%
15-19	4,246	3,404	-19.8%	2,751	-35.2%
20-24	4,081	3,067	-24.8%	2,653	-35.0%
25-29	3,133	2,891	-7.7%	2,311	-26.2%
30-34	2,973	3,496	17.6%	2,637	-11.3%
35-39	3,328	3,335	0.2%	3,106	-6.7%
40-44	4,059	2,967	-26.9%	3,501	-13.7%
45-49	5,068	3,412	-32.7%	3,425	-32.4%
50-54	5,330	4,031	-24.4%	2,951	-44.6%
55-59	5,118	4,959	-3.1%	3,348	-34.6%
60-64	4,457	5,126	15.0%	3,899	-12.5%
65-69	3,280	4,655	41.9%	4,561	39.1%
70-74	2,279	3,754	64.7%	4,384	92.4%
75-79	1,807	2,453	35.7%	3,524	95.0%
80-84	1,450	1,444	-0.4%	2,399	65.4%
85+	1,441	1,549	7.5%	1,963	36.2%
Total	61,642	58,494	-5.1%	54,175	-12.1%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Washington County					
<5	3,087	2,877	-6.8%	2,893	-6.3%
5-9	3,366	3,208	-4.7%	3,411	1.3%
10-14	3,542	3,493	-1.4%	3,355	-5.3%
15-19	4,146	3,731	-10.0%	3,546	-14.5%
20-24	3,597	3,006	-16.4%	2,972	-17.4%
25-29	3,085	2,993	-3.0%	2,685	-13.0%
30-34	3,342	3,457	3.4%	2,899	-13.3%
35-39	3,690	3,702	0.3%	3,625	-1.8%
40-44	4,211	3,591	-14.7%	3,726	-11.5%
45-49	4,760	3,791	-20.4%	3,810	-20.0%
50-54	5,096	4,276	-16.1%	3,651	-28.4%
55-59	4,810	4,529	-5.8%	3,618	-24.8%
60-64	4,185	4,759	13.7%	4,016	-4.0%
65-69	2,654	4,175	57.3%	3,976	49.8%
70-74	1,952	3,515	80.1%	4,058	107.9%
75-79	1,554	2,086	34.2%	3,315	113.3%
80-84	1,160	1,309	12.8%	2,381	105.3%
85+	1,297	1,529	17.9%	2,023	56.0%
Total	59,534	60,027	0.8%	59,960	0.7%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Windham County					
<5	2,148	2,098	-2.3%	2,081	-3.1%
5-9	2,347	2,300	-2.0%	2,391	1.9%
10-14	2,624	2,402	-8.5%	2,382	-9.2%
15-19	2,839	2,363	-16.8%	2,309	-18.7%
20-24	2,513	2,013	-19.9%	1,847	-26.5%
25-29	2,378	2,152	-9.5%	1,786	-24.9%
30-34	2,258	2,793	23.7%	2,244	-0.6%
35-39	2,337	2,524	8.0%	2,306	-1.3%
40-44	2,846	2,323	-18.4%	2,882	1.3%
45-49	3,703	2,447	-33.9%	2,647	-28.5%
50-54	3,994	2,910	-27.1%	2,379	-40.4%
55-59	3,989	3,722	-6.7%	2,467	-38.2%
60-64	3,370	3,852	14.3%	2,822	-16.3%
65-69	2,395	3,718	55.2%	3,508	46.5%
70-74	1,572	2,815	79.1%	3,266	107.8%
75-79	1,234	1,831	48.4%	2,874	132.9%
80-84	985	1,040	5.6%	1,876	90.5%
85+	981	1,124	14.6%	1,542	57.2%
Total	44,513	44,427	-0.2%	43,609	-2.0%

Vermont Population Projections by Age and County, 2020, 2030 - Scenario B

Ages	2010 Census	2020	%change from 2010	2030	%change from 2010
Windsor County					
<5	2,672	2,544	-4.8%	2,624	-1.8%
5-9	3,027	2,901	-4.2%	3,150	4.1%
10-14	3,349	3,124	-6.7%	3,060	-8.6%
15-19	3,244	2,703	-16.7%	2,583	-20.4%
20-24	2,598	1,995	-23.2%	1,866	-28.2%
25-29	3,184	2,721	-14.5%	2,261	-29.0%
30-34	2,913	3,396	16.6%	2,616	-10.2%
35-39	3,078	3,426	11.3%	2,955	-4.0%
40-44	3,586	3,134	-12.6%	3,665	2.2%
45-49	4,678	3,204	-31.5%	3,571	-23.7%
50-54	5,069	3,644	-28.1%	3,190	-37.1%
55-59	4,933	4,575	-7.3%	3,144	-36.3%
60-64	4,248	4,789	12.7%	3,462	-18.5%
65-69	3,281	4,609	40.5%	4,322	31.7%
70-74	2,249	3,628	61.3%	4,151	84.6%
75-79	1,718	2,423	41.0%	3,447	100.6%
80-84	1,368	1,412	3.2%	2,298	68.0%
85+	1,475	1,560	5.8%	2,030	37.6%
Total	56,670	55,788	-1.6%	54,395	-4.0%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Addison County					
ADDISON	1,371	1,444	5.3%	1,459	6.4%
BRIDPORT	1,218	1,203	-1.2%	1,168	-4.1%
BRISTOL	3,894	3,850	-1.1%	3,749	-3.7%
CORNWALL	1,185	1,187	0.2%	1,167	-1.5%
FERRISBURGH	2,775	2,860	3.1%	2,859	3.0%
GOSHEN	164	138	-15.9%	120	-26.8%
GRANVILLE	298	286	-4.0%	273	-8.4%
HANCOCK	323	300	-7.1%	279	-13.6%
LEICESTER	1,100	1,171	6.5%	1,200	9.1%
LINCOLN	1,271	1,342	5.6%	1,362	7.2%
MIDDLEBURY	8,496	8,465	-0.4%	8,287	-2.5%
MONKTON	1,980	2,138	8.0%	2,208	11.5%
NEW HAVEN	1,727	1,800	4.2%	1,812	4.9%
ORWELL	1,250	1,269	1.5%	1,258	0.6%
PANTON	677	677	0.0%	663	-2.1%
RIPTON	588	625	6.3%	637	8.3%
SALISBURY	1,136	1,147	1.0%	1,132	-0.4%
SHOREHAM	1,265	1,282	1.3%	1,268	0.2%
STARKEBORO	1,777	1,785	0.5%	1,747	-1.7%
VERGENNES	2,588	2,489	-3.8%	2,373	-8.3%
WALTHAM	486	483	-0.6%	472	-2.9%
WEYBRIDGE	833	835	0.2%	820	-1.6%
WHITING	419	422	0.7%	417	-0.5%
County Total	36,821	37,198	1.0%	36,730	-0.2%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Bennington County					
ARLINGTON	2,317	2,308	-0.4%	2,262	-2.4%
BENNINGTON	15,764	15,644	-0.8%	15,321	-2.8%
DORSET	2,031	2,064	1.6%	2,051	1.0%
LANDGROVE	158	169	7.0%	174	10.1%
MANCHESTER	4,391	4,680	6.6%	4,798	9.3%
PERU	375	384	2.4%	381	1.6%
POWNAL	3,527	3,538	0.3%	3,486	-1.2%
READSBORO	763	756	-0.9%	737	-3.4%
RUPERT	714	734	2.8%	735	2.9%
SANDGATE	405	463	14.3%	498	23.0%
SEARSBURG	109	120	10.1%	126	15.6%
SHAFTSBURY	3,590	3,620	0.8%	3,572	-0.5%
STAMFORD	824	842	2.2%	840	1.9%
SUNDERLAND	956	1,012	5.9%	1,037	8.5%
WINHALL	769	895	16.4%	972	26.4%
WOODFORD	424	457	7.8%	471	11.1%
GLASTENBURY	8	9	12.5%	9	12.5%
County Total	37,125	37,695	1.5%	37,470	0.9%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Caledonia County					
BARNET	1,708	1,779	4.2%	1,802	5.5%
BURKE	1,753	1,883	7.4%	1,954	11.5%
DANVILLE	2,196	2,247	2.3%	2,248	2.4%
GROTON	1,022	1,098	7.4%	1,142	11.7%
HARDWICK	3,010	2,952	-1.9%	2,874	-4.5%
KIRBY	493	545	10.5%	575	16.6%
LYNDON	5,981	6,222	4.0%	6,322	5.7%
NEWARK	581	688	18.4%	763	31.3%
PEACHAM	732	771	5.3%	789	7.8%
RYEGATE	1,174	1,198	2.0%	1,198	2.0%
SHEFFIELD	703	743	5.7%	758	7.8%
ST. JOHNSBURY	7,603	7,525	-1.0%	7,384	-2.9%
STANNARD	216	244	13.0%	263	21.8%
SUTTON	1,029	1,075	4.5%	1,091	6.0%
WALDEN	935	1,040	11.2%	1,106	18.3%
WATERFORD	1,280	1,343	4.9%	1,376	7.5%
WHEELLOCK	811	981	21.0%	1,107	36.5%
County Total	31,227	32,334	3.5%	32,752	4.9%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Chittenden County					
BOLTON	1,182	1,299	9.9%	1,385	17.2%
BURLINGTON	42,417	43,645	2.9%	44,375	4.6%
CHARLOTTE	3,754	3,945	5.1%	4,059	8.1%
COLCHESTER	17,067	17,621	3.2%	17,901	4.9%
ESSEX	19,587	20,556	4.9%	21,138	7.9%
HINESBURG	4,396	4,551	3.5%	4,632	5.4%
HUNTINGTON	1,938	2,037	5.1%	2,096	8.2%
JERICO	5,009	5,173	3.3%	5,254	4.9%
MILTON	10,352	11,067	6.9%	11,531	11.4%
RICHMOND	4,081	4,143	1.5%	4,165	2.1%
SHELBURNE	7,144	7,512	5.2%	7,725	8.1%
SOUTH BURLINGTON	17,904	20,258	13.1%	21,973	22.7%
ST. GEORGE	674	656	-2.7%	642	-4.7%
UNDERHILL	3,016	3,059	1.4%	3,076	2.0%
WESTFORD	2,029	2,086	2.8%	2,110	4.0%
WILLISTON	8,698	10,420	19.8%	11,683	34.3%
WINOOSKI	7,267	7,573	4.2%	7,775	7.0%
BUEL'S GORE	30	89	196.7%	198	560.0%
County Total	156,545	165,690	5.8%	171,718	9.7%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Essex County					
BLOOMFIELD	221	192	-13.1%	166	-24.9%
BRIGHTON	1,222	1,069	-12.5%	932	-23.7%
BRUNSWICK	112	112	0.0%	106	-5.4%
CANAAN	972	855	-12.0%	745	-23.4%
CONCORD	1,235	1,199	-2.9%	1,116	-9.6%
EAST HAVEN	290	274	-5.5%	251	-13.4%
GRANBY	88	84	-4.5%	77	-12.5%
GUILDHALL	261	240	-8.0%	216	-17.2%
LEMINGTON	104	97	-6.7%	88	-15.4%
LUNENBURG	1,302	1,248	-4.1%	1,151	-11.6%
MAIDSTONE	208	281	35.1%	339	63.0%
NORTON	169	152	-10.1%	133	-21.3%
VICTORY	62	61	-1.6%	56	-9.7%
AVERILL	24	46	91.7%	73	204.2%
AVERY'S GORE	0	0	0.0%	0	0.0%
FERDINAND	32	33	3.1%	32	0.0%
LEWIS	0	0	0.0%	0	0.0%
WARNER'S GRANT	0	0	0.0%	0	0.0%
WARREN'S GORE	4	6	50.0%	8	100.0%
County Total	6,306	5,949	-5.7%	5,489	-13.0%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Franklin County					
BAKERSFIELD	1,322	1,474	11.5%	1,603	21.3%
BERKSHIRE	1,692	1,964	16.1%	2,202	30.1%
ENOSBURGH	2,781	2,877	3.5%	2,978	7.1%
FAIRFAX	4,285	5,232	22.1%	6,054	41.3%
FAIRFIELD	1,891	1,993	5.4%	2,090	10.5%
FLETCHER	1,277	1,424	11.5%	1,548	21.2%
FRANKLIN	1,405	1,561	11.1%	1,695	20.6%
GEORGIA	4,515	4,822	6.8%	5,095	12.8%
HIGHGATE	3,535	3,754	6.2%	3,955	11.9%
MONTGOMERY	1,201	1,400	16.6%	1,574	31.1%
RICHFORD	2,308	2,365	2.5%	2,433	5.4%
SHELDON	2,190	2,398	9.5%	2,581	17.9%
ST. ALBANS TOWN	5,999	8,286	38.1%	9,508	58.5%
ST. ALBANS CITY	6,918	5,487	-20.7%	5,230	-24.4%
SWANTON	6,427	6,773	5.4%	7,101	10.5%
County Total	47,746	51,810	8.5%	55,647	16.5%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Grand Isle County					
ALBURGH	1,998	2,595	29.9%	3,224	61.4%
GRAND ISLE	2,067	2,585	25.1%	3,145	52.2%
ISLE LA MOTTE	471	566	20.2%	670	42.3%
NORTH HERO	803	1,069	33.1%	1,345	67.5%
SOUTH HERO	1,631	1,962	20.3%	2,324	42.5%
County Total	6,970	8,777	25.9%	10,708	53.6%
Lamoille County					
BELVIDERE	348	433	24.4%	511	46.8%
CAMBRIDGE	3,659	4,396	20.1%	5,074	38.7%
EDEN	1,323	1,650	24.7%	1,949	47.3%
ELMORE	855	1,028	20.2%	1,180	38.0%
HYDE PARK	2,954	3,394	14.9%	3,796	28.5%
JOHNSON	3,446	3,828	11.1%	4,198	21.8%
MORRISTOWN	5,227	5,777	10.5%	6,305	20.6%
STOWE	4,314	4,916	14.0%	5,458	26.5%
WATERVILLE	673	765	13.7%	847	25.9%
WOLCOTT	1,676	2,011	20.0%	2,321	38.5%
County Total	24,475	28,198	15.2%	31,639	29.3%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Orange County					
BRADFORD	2,797	2,907	3.9%	2,950	5.5%
BRAINTREE	1,246	1,273	2.2%	1,277	2.5%
BROOKFIELD	1,292	1,363	5.5%	1,395	8.0%
CHELSEA	1,238	1,252	1.1%	1,245	0.6%
CORINTH	1,367	1,377	0.7%	1,363	-0.3%
FAIRLEE	977	1,001	2.5%	1,005	2.9%
NEWBURY	2,216	2,342	5.7%	2,408	8.7%
ORANGE	1,072	1,141	6.4%	1,177	9.8%
RANDOLPH	4,778	4,745	-0.7%	4,666	-2.3%
STRAFFORD	1,098	1,164	6.0%	1,195	8.8%
THETFORD	2,588	2,611	0.9%	2,592	0.2%
TOPSHAM	1,173	1,245	6.1%	1,277	8.9%
TUNBRIDGE	1,284	1,309	1.9%	1,308	1.9%
VERSHIRE	730	807	10.5%	855	17.1%
WASHINGTON	1,039	1,061	2.1%	1,062	2.2%
WEST FAIRLEE	652	640	-1.8%	623	-4.4%
WILLIAMSTOWN	3,389	3,575	5.5%	3,658	7.9%
County Total	28,936	29,813	3.0%	30,056	3.9%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Orleans County					
ALBANY	941	1,017	8.1%	1,063	13.0%
BARTON	2,810	2,790	-0.7%	2,754	-2.0%
BROWNINGTON	988	1,111	12.4%	1,189	20.3%
CHARLESTON	1,023	1,114	8.9%	1,170	14.4%
COVENTRY	1,086	1,197	10.2%	1,263	16.3%
CRAFTSBURY	1,206	1,289	6.9%	1,334	10.6%
DERBY	4,621	4,676	1.2%	4,667	1.0%
GLOVER	1,122	1,265	12.7%	1,359	21.1%
GREENSBORO	762	775	1.7%	774	1.6%
HOLLAND	629	714	13.5%	766	21.8%
IRASBURG	1,163	1,267	8.9%	1,327	14.1%
JAY	521	596	14.4%	647	24.2%
LOWELL	879	1,018	15.8%	1,113	26.6%
MORGAN	749	860	14.8%	933	24.6%
NEWPORT CITY	4,589	4,561	-0.6%	4,484	-2.3%
NEWPORT TOWN	1,594	1,684	5.6%	1,730	8.5%
TROY	1,662	1,707	2.7%	1,725	3.8%
WESTFIELD	536	581	8.4%	606	13.1%
WESTMORE	350	376	7.4%	392	12.0%
County Total	27,231	28,598	5.0%	29,296	7.6%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Rutland County					
BENSON	1,056	1,115	5.6%	1,118	5.9%
BRANDON	3,966	3,883	-2.1%	3,720	-6.2%
CASTLETON	4,717	4,887	3.6%	4,862	3.1%
CHITTENDEN	1,258	1,310	4.1%	1,306	3.8%
CLARENDON	2,571	2,433	-5.4%	2,272	-11.6%
DANBY	1,311	1,336	1.9%	1,311	0.0%
FAIR HAVEN	2,734	2,629	-3.8%	2,481	-9.3%
HUBBARDTON	706	732	3.7%	723	2.4%
IRA	432	424	-1.9%	406	-6.0%
MENDON	1,059	1,060	0.1%	1,030	-2.7%
MIDDLETOWN SPRINGS	745	740	-0.7%	712	-4.4%
MOUNT HOLLY	1,237	1,265	2.3%	1,244	0.6%
MOUNT TABOR	255	282	10.6%	295	15.7%
PAWLET	1,477	1,530	3.6%	1,520	2.9%
PITTSFIELD	546	630	15.4%	677	24.0%
PITTSFORD	2,991	2,950	-1.4%	2,829	-5.4%
POULTNEY	3,432	3,340	-2.7%	3,176	-7.5%
PROCTOR	1,741	1,640	-5.8%	1,528	-12.2%
RUTLAND CITY	16,495	15,757	-4.5%	14,825	-10.1%
RUTLAND TOWN	4,054	4,094	1.0%	3,995	-1.5%
KILLINGTON	811	797	-1.7%	754	-7.0%
SHREWSBURY	1,056	1,022	-3.2%	969	-8.2%
SUDBURY	560	562	0.4%	545	-2.7%
TINMOUTH	613	670	9.3%	689	12.4%
WALLINGFORD	2,079	1,993	-4.1%	1,875	-9.8%
WELLS	1,150	1,224	6.4%	1,235	7.4%
WEST HAVEN	264	256	-3.0%	243	-8.0%
WEST RUTLAND	2,326	2,230	-4.1%	2,099	-9.8%
County Total	61,642	60,791	-1.4%	58,439	-5.2%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Washington County					
BARRE TOWN	7,924	8,116	2.4%	8,252	4.1%
BARRE CITY	9,052	8,864	-2.1%	8,743	-3.4%
BERLIN	2,887	2,974	3.0%	3,029	4.9%
CABOT	1,433	1,615	12.7%	1,753	22.3%
CALAIS	1,607	1,645	2.4%	1,672	4.0%
DUXBURY	1,337	1,464	9.5%	1,550	15.9%
EAST MONTPELIER	2,576	2,664	3.4%	2,718	5.5%
FAYSTON	1,353	1,590	17.5%	1,772	31.0%
MARSHFIELD	1,588	1,680	5.8%	1,744	9.8%
MIDDLESEX	1,731	1,787	3.2%	1,823	5.3%
MONTPELIER	7,855	7,694	-2.0%	7,591	-3.4%
MORETOWN	1,658	1,724	4.0%	1,766	6.5%
NORTHFIELD	6,207	6,458	4.0%	6,638	6.9%
PLAINFIELD	1,243	1,215	-2.3%	1,196	-3.8%
ROXBURY	691	757	9.6%	809	17.1%
WAITSFIELD	1,719	1,815	5.6%	1,880	9.4%
WARREN	1,705	1,895	11.1%	2,023	18.7%
WATERBURY	5,064	5,213	2.9%	5,314	4.9%
WOODBURY	906	970	7.1%	1,016	12.1%
WORCESTER	998	1,046	4.8%	1,083	8.5%
County Total	59,534	61,186	2.8%	62,372	4.8%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Windham County					
ATHENS	442	527	19.2%	591	33.7%
BRATTLEBORO	12,046	12,244	1.6%	12,271	1.9%
BROOKLINE	530	598	12.8%	642	21.1%
DOVER	1,124	1,150	2.3%	1,145	1.9%
DUMMERSTON	1,864	1,889	1.3%	1,886	1.2%
GRAFTON	679	721	6.2%	744	9.6%
GUILFORD	2,121	2,231	5.2%	2,286	7.8%
HALIFAX	728	777	6.7%	800	9.9%
JAMAICA	1,035	1,171	13.1%	1,258	21.5%
LONDONDERRY	1,769	1,895	7.1%	1,964	11.0%
MARLBORO	1,078	1,170	8.5%	1,227	13.8%
NEWFANE	1,726	1,819	5.4%	1,865	8.1%
PUTNEY	2,702	2,872	6.3%	2,960	9.5%
ROCKINGHAM	5,282	5,329	0.9%	5,315	0.6%
STRATTON	216	291	34.7%	357	65.3%
TOWNSHEND	1,232	1,341	8.8%	1,405	14.0%
VERNON	2,206	2,370	7.4%	2,460	11.5%
WARDSBORO	900	1,011	12.3%	1,081	20.1%
WESTMINSTER	3,178	3,273	3.0%	3,304	4.0%
WHITINGHAM	1,357	1,450	6.9%	1,501	10.6%
WILMINGTON	1,876	1,826	-2.7%	1,769	-5.7%
WINDHAM	419	518	23.6%	594	41.8%
SOMERSET	3	4	33.3%	4	33.3%
County Total	44,513	46,477	4.4%	47,429	6.6%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario A

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Windsor County					
ANDOVER	467	506	8.4%	528	13.1%
BALTIMORE	244	268	9.8%	282	15.6%
BARNARD	947	994	5.0%	1,018	7.5%
BETHEL	2,030	2,151	6.0%	2,223	9.5%
BRIDGEWATER	936	965	3.1%	977	4.4%
CAVENDISH	1,367	1,398	2.3%	1,406	2.9%
CHESTER	3,154	3,366	6.7%	3,494	10.8%
HARTFORD	9,952	10,302	3.5%	10,457	5.1%
HARTLAND	3,393	3,653	7.7%	3,815	12.4%
LUDLOW	1,963	1,855	-5.5%	1,770	-9.8%
NORWICH	3,414	3,579	4.8%	3,661	7.2%
PLYMOUTH	619	715	15.5%	782	26.3%
POMFRET	904	923	2.1%	928	2.7%
READING	666	692	3.9%	703	5.6%
ROCHESTER	1,139	1,155	1.4%	1,158	1.7%
ROYALTON	2,773	3,011	8.6%	3,163	14.1%
SHARON	1,502	1,659	10.5%	1,761	17.2%
SPRINGFIELD	9,373	9,683	3.3%	9,852	5.1%
STOCKBRIDGE	736	809	9.9%	858	16.6%
WEATHERSFIELD	2,825	2,959	4.7%	3,033	7.4%
WESTON	566	596	5.3%	609	7.6%
WEST WINDSOR	1,099	1,192	8.5%	1,250	13.7%
WINDSOR	3,553	3,571	0.5%	3,560	0.2%
WOODSTOCK	3,048	3,055	0.2%	3,040	-0.3%
County Total	56,670	59,057	4.2%	60,328	6.5%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Addison County					
ADDISON	1,371	1,391	1.5%	1,356	-1.1%
BRIDPORT	1,218	1,158	-4.9%	1,084	-11.0%
BRISTOL	3,894	3,706	-4.8%	3,480	-10.6%
CORNWALL	1,185	1,143	-3.5%	1,083	-8.6%
FERRISBURGH	2,775	2,754	-0.8%	2,656	-4.3%
GOSHEN	164	132	-19.5%	111	-32.3%
GRANVILLE	298	276	-7.4%	254	-14.8%
HANCOCK	323	289	-10.5%	258	-20.1%
LEICESTER	1,100	1,128	2.5%	1,116	1.5%
LINCOLN	1,271	1,293	1.7%	1,266	-0.4%
MIDDLEBURY	8,496	8,151	-4.1%	7,695	-9.4%
MONKTON	1,980	2,060	4.0%	2,054	3.7%
NEW HAVEN	1,727	1,734	0.4%	1,684	-2.5%
ORWELL	1,250	1,222	-2.2%	1,169	-6.5%
PANTON	677	652	-3.7%	616	-9.0%
RIPTON	588	602	2.4%	592	0.7%
SALISBURY	1,136	1,104	-2.8%	1,051	-7.5%
SHOREHAM	1,265	1,235	-2.4%	1,178	-6.9%
STARSBORO	1,777	1,719	-3.3%	1,623	-8.7%
VERGENNES	2,588	2,395	-7.5%	2,201	-15.0%
WALTHAM	486	465	-4.3%	438	-9.9%
WEYBRIDGE	833	805	-3.4%	761	-8.6%
WHITING	419	406	-3.1%	387	-7.6%
County Total	36,821	35,820	-2.7%	34,113	-7.4%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Bennington County					
ARLINGTON	2,317	2,233	-3.6%	2,114	-8.8%
BENNINGTON	15,764	15,132	-4.0%	14,318	-9.2%
DORSET	2,031	1,997	-1.7%	1,918	-5.6%
LANDGROVE	158	164	3.8%	163	3.2%
MANCHESTER	4,391	4,529	3.1%	4,490	2.3%
PERU	375	372	-0.8%	357	-4.8%
POWNAL	3,527	3,423	-2.9%	3,258	-7.6%
READSBORO	763	731	-4.2%	689	-9.7%
RUPERT	714	711	-0.4%	688	-3.6%
SANDGATE	405	448	10.6%	467	15.3%
SEARSBURG	109	116	6.4%	118	8.3%
SHAFTSBURY	3,590	3,503	-2.4%	3,339	-7.0%
STAMFORD	824	815	-1.1%	786	-4.6%
SUNDERLAND	956	979	2.4%	970	1.5%
WINHALL	769	867	12.7%	911	18.5%
WOODFORD	424	442	4.2%	440	3.8%
GLASTENBURY	8	8	0.0%	8	0.0%
County Total	37,125	36,470	-1.8%	35,034	-5.6%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Caledonia County					
BARNET	1,708	1,772	3.7%	1,790	4.8%
BURKE	1,753	1,875	7.0%	1,941	10.7%
DANVILLE	2,196	2,237	1.9%	2,233	1.7%
GROTON	1,022	1,093	6.9%	1,134	11.0%
HARDWICK	3,010	2,940	-2.3%	2,854	-5.2%
KIRBY	493	543	10.1%	571	15.8%
LYNDON	5,981	6,196	3.6%	6,280	5.0%
NEWARK	581	685	17.9%	759	30.6%
PEACHAM	732	767	4.8%	784	7.1%
RYEGATE	1,174	1,193	1.6%	1,190	1.4%
SHEFFIELD	703	740	5.3%	753	7.1%
ST. JOHNSBURY	7,603	7,493	-1.4%	7,335	-3.5%
STANNARD	216	243	12.5%	261	20.8%
SUTTON	1,029	1,070	4.0%	1,084	5.3%
WALDEN	935	1,036	10.8%	1,099	17.5%
WATERFORD	1,280	1,337	4.5%	1,367	6.8%
WHEELOCK	811	977	20.5%	1,099	35.5%
County Total	31,227	32,197	3.1%	32,534	4.2%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Chittenden County					
BOLTON	1,182	1,269	7.4%	1,315	11.3%
BURLINGTON	42,417	42,617	0.5%	42,095	-0.8%
CHARLOTTE	3,754	3,852	2.6%	3,852	2.6%
COLCHESTER	17,067	17,206	0.8%	16,981	-0.5%
ESSEX	19,587	20,074	2.5%	20,057	2.4%
HINESBURG	4,396	4,444	1.1%	4,395	0.0%
HUNTINGTON	1,938	1,990	2.7%	1,989	2.6%
JERICO	5,009	5,051	0.8%	4,984	-0.5%
MILTON	10,352	10,808	4.4%	10,945	5.7%
RICHMOND	4,081	4,045	-0.9%	3,950	-3.2%
SHELBURNE	7,144	7,336	2.7%	7,330	2.6%
SOUTH BURLINGTON	17,904	19,791	10.5%	20,874	16.6%
ST. GEORGE	674	640	-5.0%	608	-9.8%
UNDERHILL	3,016	2,987	-1.0%	2,917	-3.3%
WESTFORD	2,029	2,037	0.4%	2,001	-1.4%
WILLISTON	8,698	10,183	17.1%	11,107	27.7%
WINOOSKI	7,267	7,395	1.8%	7,377	1.5%
BUEL'S GORE	30	87	190.0%	190	533.3%
County Total	156,545	161,812	3.4%	162,967	4.1%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Essex County					
BLOOMFIELD	221	193	-12.7%	166	-24.9%
BRIGHTON	1,222	1,074	-12.1%	930	-23.9%
BRUNSWICK	112	112	0.0%	106	-5.4%
CANAAN	972	858	-11.7%	743	-23.6%
CONCORD	1,235	1,204	-2.5%	1,114	-9.8%
EAST HAVEN	290	275	-5.2%	250	-13.8%
GRANBY	88	84	-4.5%	77	-12.5%
GUILDHALL	261	241	-7.7%	216	-17.2%
LEMINGTON	104	98	-5.8%	88	-15.4%
LUNENBURG	1,302	1,253	-3.8%	1,149	-11.8%
MAIDSTONE	208	283	36.1%	339	63.0%
NORTON	169	153	-9.5%	133	-21.3%
VICTORY	62	61	-1.6%	56	-9.7%
AVERILL	24	46	91.7%	73	204.2%
AVERY'S GORE	0	0	0.0%	0	0.0%
FERDINAND	32	33	3.1%	32	0.0%
LEWIS	0	0	0.0%	0	0.0%
WARNER'S GRANT	0	0	0.0%	0	0.0%
WARREN'S GORE	4	6	50.0%	8	100.0%
County Total	6,306	5,974	-5.3%	5,480	-13.1%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Franklin County					
BAKERSFIELD	1,322	1,402	6.1%	1,462	10.6%
BERKSHIRE	1,692	1,868	10.4%	2,011	18.9%
ENOSBURGH	2,781	2,733	-1.7%	2,711	-2.5%
FAIRFAX	4,285	4,981	16.2%	5,535	29.2%
FAIRFIELD	1,891	1,894	0.2%	1,904	0.7%
FLETCHER	1,277	1,354	6.0%	1,412	10.6%
FRANKLIN	1,405	1,484	5.6%	1,546	10.0%
GEORGIA	4,515	4,583	1.5%	4,643	2.8%
HIGHGATE	3,535	3,568	0.9%	3,604	2.0%
MONTGOMERY	1,201	1,333	11.0%	1,438	19.7%
RICHFORD	2,308	2,246	-2.7%	2,215	-4.0%
SHELDON	2,190	2,280	4.1%	2,354	7.5%
ST. ALBANS TOWN	5,999	7,887	31.5%	8,690	44.9%
ST. ALBANS CITY	6,918	5,204	-24.8%	4,745	-31.4%
SWANTON	6,427	6,436	0.1%	6,469	0.7%
County Total	47,746	49,253	3.2%	50,739	6.3%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Grand Isle County					
ALBURGH	1,998	2,007	0.5%	1,937	-3.1%
GRAND ISLE	2,067	1,994	-3.5%	1,879	-9.1%
ISLE LA MOTTE	471	435	-7.6%	398	-15.5%
NORTH HERO	803	827	3.0%	811	1.0%
SOUTH HERO	1,631	1,510	-7.4%	1,380	-15.4%
County Total	6,970	6,773	-2.8%	6,405	-8.1%
Lamoille County					
BELVIDERE	348	389	11.8%	416	19.5%
CAMBRIDGE	3,659	3,945	7.8%	4,119	12.6%
EDEN	1,323	1,482	12.0%	1,585	19.8%
ELMORE	855	923	8.0%	958	12.0%
HYDE PARK	2,954	3,043	3.0%	3,072	4.0%
JOHNSON	3,446	3,429	-0.5%	3,392	-1.6%
MORRISTOWN	5,227	5,173	-1.0%	5,092	-2.6%
STOWE	4,314	4,406	2.1%	4,415	2.3%
WATERVILLE	673	686	1.9%	685	1.8%
WOLCOTT	1,676	1,805	7.7%	1,884	12.4%
County Total	24,475	25,281	3.3%	25,618	4.7%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Orange County					
BRADFORD	2,797	2,822	0.9%	2,792	-0.2%
BRAINTREE	1,246	1,236	-0.8%	1,209	-3.0%
BROOKFIELD	1,292	1,323	2.4%	1,320	2.2%
CHELSEA	1,238	1,215	-1.9%	1,178	-4.8%
CORINTH	1,367	1,337	-2.2%	1,289	-5.7%
FAIRLEE	977	972	-0.5%	950	-2.8%
NEWBURY	2,216	2,274	2.6%	2,280	2.9%
ORANGE	1,072	1,108	3.4%	1,115	4.0%
RANDOLPH	4,778	4,606	-3.6%	4,413	-7.6%
STRAFFORD	1,098	1,131	3.0%	1,132	3.1%
THETFORD	2,588	2,534	-2.1%	2,452	-5.3%
TOPSHAM	1,173	1,209	3.1%	1,209	3.1%
TUNBRIDGE	1,284	1,271	-1.0%	1,238	-3.6%
VERSHIRE	730	784	7.4%	810	11.0%
WASHINGTON	1,039	1,030	-0.9%	1,004	-3.4%
WEST FAIRLEE	652	622	-4.6%	589	-9.7%
WILLIAMSTOWN	3,389	3,472	2.4%	3,463	2.2%
County Total	28,936	28,946	0.0%	28,443	-1.7%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Orleans County					
ALBANY	941	976	3.7%	981	4.3%
BARTON	2,810	2,674	-4.8%	2,536	-9.8%
BROWNINGTON	988	1,066	7.9%	1,097	11.0%
CHARLESTON	1,023	1,069	4.5%	1,080	5.6%
COVENTRY	1,086	1,149	5.8%	1,165	7.3%
CRAFTSBURY	1,206	1,237	2.6%	1,230	2.0%
DERBY	4,621	4,483	-3.0%	4,298	-7.0%
GLOVER	1,122	1,214	8.2%	1,255	11.9%
GREENSBORO	762	742	-2.6%	713	-6.4%
HOLLAND	629	685	8.9%	708	12.6%
IRASBURG	1,163	1,215	4.5%	1,224	5.2%
JAY	521	571	9.6%	598	14.8%
LOWELL	879	977	11.1%	1,029	17.1%
MORGAN	749	825	10.1%	861	15.0%
NEWPORT CITY	4,589	4,371	-4.8%	4,128	-10.0%
NEWPORT TOWN	1,594	1,615	1.3%	1,595	0.1%
TROY	1,662	1,637	-1.5%	1,589	-4.4%
WESTFIELD	536	557	3.9%	559	4.3%
WESTMORE	350	361	3.1%	362	3.4%
County Total	27,231	27,424	0.7%	27,008	-0.8%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Rutland County					
BENSON	1,056	1,073	1.6%	1,038	-1.7%
BRANDON	3,966	3,737	-5.8%	3,448	-13.1%
CASTLETON	4,717	4,704	-0.3%	4,512	-4.3%
CHITTENDEN	1,258	1,261	0.2%	1,212	-3.7%
CLARENDON	2,571	2,340	-9.0%	2,104	-18.2%
DANBY	1,311	1,286	-1.9%	1,216	-7.2%
FAIR HAVEN	2,734	2,529	-7.5%	2,298	-15.9%
HUBBARDTON	706	704	-0.3%	671	-5.0%
IRA	432	409	-5.3%	377	-12.7%
MENDON	1,059	1,020	-3.7%	955	-9.8%
MIDDLETOWN SPRINGS	745	712	-4.4%	659	-11.5%
MOUNT HOLLY	1,237	1,218	-1.5%	1,154	-6.7%
MOUNT TABOR	255	272	6.7%	274	7.5%
PAWLET	1,477	1,473	-0.3%	1,411	-4.5%
PITTSFIELD	546	607	11.2%	630	15.4%
PITTSFORD	2,991	2,838	-5.1%	2,623	-12.3%
POULTNEY	3,432	3,213	-6.4%	2,943	-14.2%
PROCTOR	1,741	1,578	-9.4%	1,415	-18.7%
RUTLAND CITY	16,495	15,157	-8.1%	13,734	-16.7%
RUTLAND TOWN	4,054	3,940	-2.8%	3,705	-8.6%
KILLINGTON	811	767	-5.4%	699	-13.8%
SHREWSBURY	1,056	983	-6.9%	898	-15.0%
SUDBURY	560	541	-3.4%	505	-9.8%
TINMOUTH	613	645	5.2%	640	4.4%
WALLINGFORD	2,079	1,917	-7.8%	1,737	-16.5%
WELLS	1,150	1,178	2.4%	1,147	-0.3%
WEST HAVEN	264	247	-6.4%	225	-14.8%
WEST RUTLAND	2,326	2,145	-7.8%	1,945	-16.4%
County Total	61,642	58,494	-5.1%	54,175	-12.1%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Washington County					
BARRE TOWN	7,924	7,962	0.5%	7,933	0.1%
BARRE CITY	9,052	8,694	-4.0%	8,400	-7.2%
BERLIN	2,887	2,918	1.1%	2,912	0.9%
CABOT	1,433	1,585	10.6%	1,687	17.7%
CALAIS	1,607	1,613	0.4%	1,607	0.0%
DUXBURY	1,337	1,436	7.4%	1,491	11.5%
EAST MONTPELIER	2,576	2,613	1.4%	2,613	1.4%
FAYSTON	1,353	1,561	15.4%	1,706	26.1%
MARSHFIELD	1,588	1,649	3.8%	1,677	5.6%
MIDDLESEX	1,731	1,754	1.3%	1,752	1.2%
MONTPELIER	7,855	7,546	-3.9%	7,294	-7.1%
MORETOWN	1,658	1,692	2.1%	1,698	2.4%
NORTHFIELD	6,207	6,336	2.1%	6,382	2.8%
PLAINFIELD	1,243	1,191	-4.2%	1,149	-7.6%
ROXBURY	691	743	7.5%	778	12.6%
WAITSFIELD	1,719	1,781	3.6%	1,808	5.2%
WARREN	1,705	1,860	9.1%	1,947	14.2%
WATERBURY	5,064	5,115	1.0%	5,108	0.9%
WOODBURY	906	951	5.0%	977	7.8%
WORCESTER	998	1,027	2.9%	1,041	4.3%
County Total	59,534	60,027	0.8%	59,960	0.7%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Windham County					
ATHENS	442	505	14.3%	545	23.3%
BRATTLEBORO	12,046	11,700	-2.9%	11,275	-6.4%
BROOKLINE	530	572	7.9%	591	11.5%
DOVER	1,124	1,099	-2.2%	1,052	-6.4%
DUMMERSTON	1,864	1,805	-3.2%	1,733	-7.0%
GRAFTON	679	690	1.6%	685	0.9%
GUILFORD	2,121	2,132	0.5%	2,102	-0.9%
HALIFAX	728	743	2.1%	736	1.1%
JAMAICA	1,035	1,120	8.2%	1,159	12.0%
LONDONDERRY	1,769	1,812	2.4%	1,806	2.1%
MARLBORO	1,078	1,119	3.8%	1,129	4.7%
NEWFANE	1,726	1,739	0.8%	1,715	-0.6%
PUTNEY	2,702	2,746	1.6%	2,723	0.8%
ROCKINGHAM	5,282	5,092	-3.6%	4,883	-7.6%
STRATTON	216	279	29.2%	330	52.8%
TOWNSHEND	1,232	1,282	4.1%	1,293	5.0%
VERNON	2,206	2,267	2.8%	2,264	2.6%
WARDSBORO	900	968	7.6%	995	10.6%
WESTMINSTER	3,178	3,128	-1.6%	3,037	-4.4%
WHITINGHAM	1,357	1,386	2.1%	1,380	1.7%
WILMINGTON	1,876	1,744	-7.0%	1,624	-13.4%
WINDHAM	419	496	18.4%	548	30.8%
SOMERSET	3	3	0.0%	4	33.3%
County Total	44,513	44,427	-0.2%	43,609	-2.0%

Vermont 2010 Census Count Projections by Town, 2020, 2030 - Scenario B

Town	2010 Census	2020	%change from 2010	2030	%change from 2010
Windsor County					
ANDOVER	467	478	2.4%	477	2.1%
BALTIMORE	244	253	3.7%	255	4.5%
BARNARD	947	939	-0.8%	918	-3.1%
BETHEL	2,030	2,033	0.1%	2,005	-1.2%
BRIDGEWATER	936	912	-2.6%	881	-5.9%
CAVENDISH	1,367	1,320	-3.4%	1,267	-7.3%
CHESTER	3,154	3,181	0.9%	3,153	0.0%
HARTFORD	9,952	9,730	-2.2%	9,426	-5.3%
HARTLAND	3,393	3,453	1.8%	3,443	1.5%
LUDLOW	1,963	1,750	-10.9%	1,590	-19.0%
NORWICH	3,414	3,381	-1.0%	3,302	-3.3%
PLYMOUTH	619	676	9.2%	707	14.2%
POMFRET	904	872	-3.5%	836	-7.5%
READING	666	654	-1.8%	634	-4.8%
ROCHESTER	1,139	1,090	-4.3%	1,043	-8.4%
ROYALTON	2,773	2,846	2.6%	2,855	3.0%
SHARON	1,502	1,569	4.5%	1,591	5.9%
SPRINGFIELD	9,373	9,145	-2.4%	8,881	-5.2%
STOCKBRIDGE	736	765	3.9%	775	5.3%
WEATHERSFIELD	2,825	2,795	-1.1%	2,735	-3.2%
WESTON	566	563	-0.5%	549	-3.0%
WEST WINDSOR	1,099	1,127	2.5%	1,128	2.6%
WINDSOR	3,553	3,372	-5.1%	3,206	-9.8%
WOODSTOCK	3,048	2,884	-5.4%	2,738	-10.2%
County Total	56,670	55,788	-1.6%	54,395	-4.0%

TABLE 2
Vermont Enrollment and Population Projections by Selected Age-Cohorts
 Consensus JFO and Administration Forecast - October 2015

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total Pop	621,215	622,892	623,481	624,151	624,817	625,792	626,450	626,138	626,855	626,562	627,314	628,318	629,574	630,959	632,474
%ch	0.21%	0.27%	0.09%	0.11%	0.11%	0.16%	0.11%	-0.05%	0.11%	-0.05%	0.12%	0.16%	0.20%	0.22%	0.24%
0-4Year	32,956	32,473	32,575	32,344	32,012	31,769	31,362	30,857	30,493	30,417	30,676	30,747	30,740	30,758	30,685
%ch	-0.27%	-1.47%	0.31%	-0.71%	-1.03%	-0.76%	-1.28%	-1.61%	-1.18%	-0.25%	0.85%	0.23%	-0.02%	0.06%	-0.24%
%share	5.305%	5.213%	5.225%	5.182%	5.123%	5.077%	5.006%	4.928%	4.864%	4.855%	4.890%	4.894%	4.883%	4.875%	4.852%
5-18Year	116,098	114,370	112,350	110,609	108,496	106,859	105,602	103,953	102,596	100,782	99,758	99,010	98,336	97,852	97,331
%ch	-1.68%	-1.49%	-1.77%	-1.55%	-1.91%	-1.51%	-1.18%	-1.56%	-1.31%	-1.77%	-1.02%	-0.75%	-0.68%	-0.49%	-0.53%
%share	18.689%	18.361%	18.020%	17.722%	17.364%	17.076%	16.857%	16.602%	16.367%	16.085%	15.902%	15.758%	15.619%	15.509%	15.389%
5-19Year	127,062	125,423	123,396	121,789	119,779	118,153	117,278	115,834	114,242	112,343	110,814	110,008	109,305	108,626	108,202
%ch	-1.63%	-1.29%	-1.62%	-1.30%	-1.65%	-1.36%	-0.74%	-1.23%	-1.37%	-1.66%	-1.36%	-0.73%	-0.64%	-0.62%	-0.39%
%share	20.454%	20.136%	19.791%	19.513%	19.170%	18.881%	18.721%	18.500%	18.225%	17.930%	17.665%	17.508%	17.362%	17.216%	17.108%
0-18Year	149,054	146,843	144,925	142,953	140,508	138,628	136,964	134,810	133,089	131,199	130,434	129,756	129,076	128,610	128,016
%ch	-1.37%	-1.48%	-1.31%	-1.36%	-1.71%	-1.34%	-1.20%	-1.57%	-1.28%	-1.42%	-0.58%	-0.52%	-0.52%	-0.36%	-0.46%
%share	23.994%	23.574%	23.244%	22.904%	22.488%	22.152%	21.864%	21.530%	21.231%	20.940%	20.792%	20.651%	20.502%	20.383%	20.241%
5-14Year	78,054	76,455	74,886	73,896	72,982	72,014	71,187	70,399	69,463	68,263	67,397	67,085	66,854	66,372	66,077
%ch	-2.71%	-2.05%	-2.05%	-1.32%	-1.24%	-1.33%	-1.15%	-1.11%	-1.33%	-1.73%	-1.27%	-0.46%	-0.34%	-0.72%	-0.45%
%share	12.565%	12.274%	12.011%	11.839%	11.681%	11.508%	11.364%	11.243%	11.081%	10.895%	10.744%	10.677%	10.619%	10.519%	10.447%
15-19Year	49,008	48,968	48,510	47,893	46,797	46,139	46,091	45,435	44,779	44,080	43,418	42,923	42,451	42,254	42,126
%ch	0.14%	-0.08%	-0.94%	-1.27%	-2.29%	-1.41%	-0.10%	-1.42%	-1.44%	-1.56%	-1.50%	-1.14%	-1.10%	-0.47%	-0.30%
%share	7.889%	7.861%	7.781%	7.673%	7.490%	7.373%	7.357%	7.256%	7.143%	7.035%	6.921%	6.831%	6.743%	6.697%	6.660%
VT Enrollments	98,363	96,636	95,481	94,114	92,572	91,239	90,289	89,428	88,596	87,933	87,230	86,645	86,248	85,915	85,801
%ch	-0.73%	-1.76%	-1.20%	-1.43%	-1.64%	-1.44%	-1.04%	-0.95%	-0.93%	-0.75%	-0.80%	-0.67%	-0.46%	-0.39%	-0.13%
POP SHARES															
0-4Year	5.305%	5.213%	5.225%	5.182%	5.123%	5.077%	5.006%	4.928%	4.864%	4.855%	4.890%	4.894%	4.883%	4.875%	4.852%
5-19Year	20.454%	20.136%	19.791%	19.513%	19.170%	18.881%	18.721%	18.500%	18.225%	17.930%	17.665%	17.508%	17.362%	17.216%	17.108%
20-24Year	7.055%	7.128%	7.070%	6.983%	7.008%	7.020%	7.009%	7.073%	7.227%	7.401%	7.422%	7.312%	7.174%	7.057%	6.940%
25-44Year	25.572%	25.044%	24.589%	24.234%	23.871%	23.581%	23.328%	23.142%	23.082%	22.882%	22.733%	22.709%	22.864%	23.077%	23.295%
45-64Year	28.546%	29.172%	29.741%	30.110%	30.532%	30.804%	30.926%	30.636%	30.259%	29.983%	29.770%	29.451%	28.987%	28.436%	27.843%
65+Year	13.069%	13.307%	13.583%	13.978%	14.295%	14.638%	15.010%	15.720%	16.343%	16.949%	17.520%	18.126%	18.730%	19.339%	19.962%
Total	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%	100.000%
POP LEVELS															
0-4Year	32,956	32,473	32,575	32,344	32,012	31,769	31,362	30,857	30,493	30,417	30,676	30,747	30,740	30,758	30,685
5-19Year	127,062	125,423	123,396	121,789	119,779	118,153	117,278	115,834	114,242	112,343	110,814	110,008	109,305	108,626	108,202
20-24Year	43,825	44,401	44,083	43,583	43,790	43,930	43,907	44,289	45,305	46,371	46,559	45,942	45,168	44,527	43,894
25-44Year	158,855	155,997	153,309	151,259	149,150	147,565	146,140	144,903	144,689	143,370	142,609	142,685	143,946	145,608	147,336
45-64Year	177,331	181,711	185,432	187,934	190,771	192,769	193,733	191,824	189,677	187,862	186,751	185,045	182,497	179,420	176,102
65+Year	81,186	82,887	84,686	87,242	89,315	91,606	94,030	98,431	102,449	106,199	109,905	113,889	117,918	122,022	126,254
Total	621,215	622,892	623,481	624,151	624,817	625,792	626,450	626,138	626,855	626,562	627,314	628,318	629,574	630,959	632,474

Items for Information and Discussion

3. Roundtable discussion with presidents on possible incentives and obstacles to greater collaboration between colleges, consistent with Board approved vision of one comprehensive and interconnected system comprised of five distinct institutions.
4. Discussion of possibilities for greater coordination between JSC and LSC, as well as between CCV and VT Tech.
 - a. Brainstorm principles to guide future consideration of this topic

The following reading materials are included to stimulate discussion on these two agenda items.

- *Between Collaboration and Merger, Expanding Alliance Strategies in Higher Education*, by Michael Thomas
- *Strategic Alliances That Are More Expansive than Consortia, But Less Risky Than Mergers*, by Doug Lederman
- Possible guiding principles for the last agenda item.



TIAA-CREF Institute

Between Collaboration and Merger:

Expanding Alliance Strategies in Higher Education

Dr. Michael K. Thomas
New England Board of Higher Education

With commentary provided by:
Dr. Kent John Chabotar, Guilford College



Financial Services



About this Research

To compete in today's financially challenging environment, many colleges and universities routinely collaborate with other institutions, including their competitors. These alliances can boost economies of scale and provide new pathways for learning. But as the higher education landscape grows increasingly complex, uncertain and dynamic, a more nuanced and creative approach to strategic alliances is called for – one that transcends well-established consortia while still avoiding full-on mergers.

To help campus leaders consider and craft such alliances, the TIAA-CREF Institute invited this work by Michael Thomas, who applies lessons learned from partnerships outside higher education, and Kent John Chabotar, whose commentary throughout the paper presents a practitioner's point of view. Together, they offer rigorous analysis and specific criteria for designing alliances with potential to enhance an institution's long-term competitiveness and financial sustainability.

About the TIAA-CREF Institute

The TIAA-CREF Institute helps advance the ways individuals and institutions plan for financial security and organizational effectiveness. The Institute conducts in-depth research, provides access to a network of thought leaders, and enables those it serves to anticipate trends, plan future strategies, and maximize opportunities for success.

To learn more about our research and initiatives for higher education leaders, please visit our website at www.tiaa-crefinstitute.org.

Executive Summary

Many U.S. higher education institutions (HEIs) face a complex combination of competitive and financial sustainability challenges that demand a more deliberate and strategic orientation toward alliances. That new breed of alliance must go beyond the valuable, but “mature” innovation of consortia and be more flexible and multi-lateral than complicated, two-institution mergers.

Drawing on the strategic alliance literature, this article considers the range of alliance arrangements, motivations and benefits, and factors for success. It identifies a “sweet spot” of HEI strategic system alliances and joint ventures to best pursue essential economies of scope and scale and core business model changes — both academic and administrative.

This next frontier of multi-HEI alliances is premised on several critical “design principles.” Specifically, they are not constrained by geographic proximity and expand partner HEIs’ reach. They pursue cost savings, efficiencies and integrations via partner HEIs’ complementary and/or supplementary “fits.” Joint resources, platforms and technology substantially increase capacity, talent and functional expertise. Such shared “utilities” can drive partner HEIs to achieve program-specific and overall enrollment growth and increased revenues.

Building the required HEI alliance capacity will require rigorous institutional self-appraisal, bold vision and focused efforts by presidents and trustees. Support from higher education-focused philanthropies and industry and sector associations will be critical. These strategic system alliances and joint ventures will likely be aided by the growing ecosystem of technology-fueled and fast-moving start-ups serving and disrupting the industry space and reconfiguring fundamental processes and activities.

Key Take-Aways

- Rather than “going it alone,” collective competition through constellations of ally institutions can significantly aid HEIs in confronting their increasingly complex, uncertain and dynamic industry and operating environments.
- Achieving long-term HEI competitiveness and sustainability will require a proactive consideration of more assertive and intentional forms of collaboration and alliance — building upon the successes of geography-based consortia, but avoiding complications and limitations of institutional mergers.
- The economies of scale and scope that are critical to improved competitiveness and sustainability elude most HEIs — but are most likely to be realized through strategically selected multilateral, complementary or supplementary alliances.
- HEI leaders and stakeholders must be educated regarding collective competition and alliance strategies. This includes understanding the benefits and motivations of strategic alliances and joint ventures, learning from other industries’ experiences, and providing a vocabulary, frameworks and best practices to support understanding of the continuum of options and critical variables.
- Effective alliances must capitalize on multiple key design criteria: substantial core HEI business model changes (academic and administrative); cost-savings, efficiencies and integration; expanded capabilities that drive growth and revenues; and a model of joint control that preserves institutional identity, independence and governance.
- An essential ingredient of competition-altering, strategic HEI alliances will be the creation of shared utilities: joint platforms and capabilities with top talent that provide operations at scale and with savings, quality and expertise levels that sustainability-challenged HEIs cannot achieve alone.

Introduction

“Higher education faces a financial sustainability crisis.” Variations on this refrain have been increasingly common in recent years — fueled by the prolonged effects of the global economic meltdown — and are frequently repeated in the higher education industry press, as well as in popular media.¹

These heightened concerns about institutional sustainability have led to a renewed interest in, and discussion of, mergers between higher education institutions (HEIs).² While some observers warn of the industry having reached a tipping point of industry restructuring, discussion of HEI mergers is not new. The topic has arisen and been debated much by many authors.³ This author’s survey of one regional accreditors list of institutional status changes indicates that HEI mergers are not uncommon.⁴

There are undoubtedly segments or groups of HEIs that face increasing financial and competitive challenges and uncertainties due to a convergence of factors. These factors and characteristics include some combination of:

- Low and stagnant or shrinking enrollment levels — often impacted by negative demographic trends in the geographies they serve;
- Limited brand awareness, distinctiveness or reputation;
- Competing primarily on a local or regional basis and often geographically isolated;
- High or growing tuition-discounting rates, reflecting a decreasing willingness (or ability) of students to pay and resulting in lower revenues;
- Modest endowments;
- Constrained finances, including shrinking revenues, high debt levels, tight cash flows and limited working capital;
- Poor quality or non-distinctive missions and value propositions;
- High fixed and per-student costs and lacking economies of scale.

The sobering reality that these and other factors pose for a notable number of HEIs — including some in the region where I lead the New England Board of Higher Education — raises pressing questions about the fundamental organization of HEIs, the structure of the industry, and the competitive landscapes in which they operate.

New HEI Alliance Opportunities?

HEI mergers are one decisive strategy for responding to financial pressures and to changed competitive environments. Similarly, many HEIs have to utilize strong collaborations and consortial memberships to achieve the same result.

Are there, however, other opportunities and compelling strategic alliances among HEIs that can expand upon collaborative successes, but that present more flexible alternatives than institutional mergers?

I assert that the answer is “Yes,” and propose to consider a series of key questions:

- Can expanded collaborations and alliances significantly alter the core competitive prospects of challenged — or soon-to-be challenged — HEIs and achieve critical economies of scale and core business model changes?

Note to the reader

The commentary that follows throughout this paper is offered by Kent John Chabotar, who served as president of Guilford College from 2002-2014. Prior to that, from 1991-2002, he was vice president for finance and administration and treasurer at Bowdoin College. Chabotar also has taught financial strategy and management to presidents and others at the Harvard Institutes for Higher Education since 1983. It is from these perspectives that he offers comments and responses to Michael Thomas’ work.

Nothing opens up an institution to the possibilities of change like a crisis. In many ways, the problems are even more complex.

- Enrollment is affected not only by lower numbers, for example, of 18 to 24 year olds but also by decreasing rates at which they are going to college.
- Many institutions fool themselves that they are distinctive because they “have small classes,” “focus on student centered instruction,” and “emphasize civic engagement.”
- Never before have tuition discounting rates increased as rapidly. But financial aid funded by the budget is a much bigger problem — because it means every dollar allocated to financial aid means a dollar not available for something else — than when the institution has significant numbers of endowment funds restricted to financial aid.

- Can new HEI alliances or joint ventures fundamentally alter the organization and structure of the higher education industry?
- What can be learned from existing higher education collaborations and alliances – and what might the next generation of these partnerships look like?
- What can be learned from other industries and related literature, regarding strategic alliances in their varied forms?
- Besides mergers, what aggressive alliance alternatives exist and what are their respective and relative benefits?

In answering such questions, it is important to note a series of acknowledgements and assumptions, which include:

- Many HEIs have strong track records of effective multi-institution collaborations, including consortia;
- A notable number of multi-institution systems – composed primarily of public institutions – exist and have achieved resource sharing, cost reductions, and greater economies of scale and scope;
- Many HEIs increasingly alter their models and business processes by utilizing external vendors and partners to deliver new or existing functions and services; and
- Many HEIs and their leaders are demonstrating increased urgency and openness to exploring new strategies and partnerships to increase financial sustainability and competitiveness.

With 4,000 to 5,000 HEI's – depending on who is doing the counting – there are just too many of them to survive the demographic trough. For example, independent institutions enroll about 15% of the students but account for 40% or thereabouts of the institutions, meaning many lack the enrollments and endowments to support their overhead costs and survive. These are the institutions who should run and not walk to consider collaborations and mergers.

A Collaborative and Consortial History

American HEIs have a long and substantive history of inter-institution collaborations, ranging from small to large in size, and from pairs to multiple institutions. Such collaborations involve traditional core HEI activities – teaching, research and public service – and span both administrative and academic realms.

As noted, a critical form of inter- and multi-institution collaboration is the consortium. Well-known examples include the Claremont University Consortium (California), the Atlanta University Center Consortium, the Virginia Tidewater Consortium for Higher Education, and the Five Colleges, Inc. (Massachusetts), to name but a few. Each varies in terms of age, size and diversity of member HEIs, scope of activities, strength and reputation and successes achieved.

Leaders of such higher education consortia have created their own professional organization, the Association for Collaborative Leadership (ACL), designed to support and expand consortial activity and leadership. It includes more than 60 organizational members, a notable number of which are regional, geography-based consortia of HEIs. Their activities provide considerable evidence that the scope and scale of HEI consortial entities and activities continue to grow in the United States – and bridge both independent and public HEIs.

Guilford College presents examples of cross-sectoral initiatives through its alliances with:

- The county public school system to start the Early College at Guilford. 9th and 10th graders take high school classes with their own faculty. 11th and 12th graders take classes with Guilford students and earn college credit. Many Early College at Guilford graduates are eligible to enter college as juniors. Guilford loses money on the venture but considers it as community service and a vehicle for recruiting these exceptional students to complete their college education with us.
- Two community colleges through meaningful course-by-course articulation agreements in eight majors. Many other agreements guarantee that the four-year college will accept the credits but not necessarily count them toward majors and distribution requirements.
- A private K-12 institution where college employees receive discounted tuition in exchange for its students having free access to up to 12 class seats per semester.

This is still a small proportion of the total HEI's in the United States. There is much room for expansion. We need to ask the question why more HEI's have not collaborated or merged?

Consortia provide two primary opportunities to participating HEIs. First, they reduce administrative, academic and other costs. Second, they expand program and service quality — academic, co-curricular and other. These primary activities commonly occur within several categories, including:

Business and administrative services and back-end functions: These include joint provision of human resource administration (payroll, benefits, etc.); training and development; finance and accounting services; records management; and compliance and risk management.

Academic offerings and services: These include cross-registration privileges, joint courses, programs and certificates (including in undersubscribed and specialized fields or majors); study abroad and global experiences; faculty development opportunities and joint faculty appointments.

Co-curricular offerings and student services: These include joint provision of arts and cultural programs and activities; student affairs, counseling and advising; disability, health and wellness services; campus police and safety; student organizations, clubs, religious life and activities; intramurals, athletics and recreation opportunities.

Shared facilities and infrastructure: These include academic, auxiliary and technology assets. Academic examples are shared libraries and library resources and technologies, as well as shared instructional facilities, research labs and field sites. Auxiliary examples include shared facilities management services, construction management and facilities planning; environmental health and safety; housing and real estate management; bookstore and food services; shared campus mail, document and imaging services. Technology examples also include IT systems (Internet, security and communications) and hardware.

In sum, consortia have achieved economies of scope and scale through shared provision of a broad range of academic and student service-oriented programs, resources and experiences. Further, they continue to drive the convergence, reduction and integration of business functions, administration and infrastructure. A substantial portion of this work is premised upon, and aided by, the geographic proximity of member HEIs.

Geographic proximity is an advantage. While email and SKYPE communications are becoming increasingly user friendly, do not underestimate the personal touch for both managers and customers in getting started and resolving problems. College towns with only high numbers of students and institutions have the proximity but often not the will. That changed in Greensboro, North Carolina when the seven colleges and universities formed a consortium that will lead to, among other things, a Downtown University Center for shared academic programs.

Experiences here and elsewhere suggest that while consortia may improve quality and increase service capacity, they struggle to save money on administrative services. Why?

- *Prior Budget Commitments.* Over 50% of budgets are spent on employee compensation — and then add in financial aid, athletics, debt service and other educational expenses — rather than on the commodities (supplies, fuel) that consortia typically target for cost savings;
- *Small Size.* Unless many colleges are involved, a consortium is often not large enough to attract many volume discounts.
- *Lack of Standardization.* Sharing services (e.g., human resources, accounts payable) require common policies and practices that the colleges have been unsuccessful in achieving due to cultural and programmatic distinctiveness, dissimilar staffing philosophies, varying access to financial resources, and different academic years and computer systems. Bowdoin, Bates, and Colby in Maine once considered sharing employee medical plans. But the amounts of money we were willing to spend and what we expected for employees differed so significantly that there was no real opportunity for compromise and the effort failed.
- *Staff and Service Reductions.* Even without these differences, the labor intensiveness of our industry suggests that most cost savings in sharing services would be achieved by cutting staff. We should be concerned about consequent reductions in the timeliness and quality of service in colleges sometimes charging their customers over \$60,000 per year.

Plateau or Launch Pad?

With the proper vision, leadership and resources, HEI consortia can achieve notable cost savings and quality program enhancements. In my own backyard, New England has some of the most successful, visionary and extensive HEI consortia in the world, supported by creative member HEIs and skilled executive directors with a high level of business acumen and academic experience.

Consortia are member-focused and will primarily seek to serve and address members' expressed goals and envisioned needs. For a majority of HEIs, it is likely that significantly more can be done to identify, pursue and achieve the potential benefits of consortial entities and agreements.

But what does the future of HEI collaboration hold? Is there more to be wrought by such entities, or is the common HEI consortium model a "mature" innovation, for which new and expanded alternatives are needed? While geographic and physical proximity is clearly an advantage — and key ingredient — of much consortial work, does it also *limit* HEIs' possibilities? What if an institution is geographically isolated or if its neighbors and would-be collaborator HEIs are not willing or able to participate?

Additionally, to what extent can consortia truly lead to HEI business model changes in the face of evident threats to HEI sustainability? Are their functions adjunct or add-ons to primary HEI models, achieving primarily economies of scope? Or do they alter the core business models and functions (both academic and administrative) to create greater financial sustainability and growing achievement of economies of scale?

Lastly, in an increasingly competitive higher education industry, can HEI consortia substantially improve an institution's competitive standing? The notion of collaboration is consistent with core HEI values, but do consortia significantly impact HEIs' ability to compete in an increasingly challenging marketplace of winners and losers?

It is critical to extend alliance capabilities and expertise to drive HEIs' core revenue-generating activities, including marketing, recruitment and admissions. Many financially compromised institutions need expedited and more affordable expertise that is focused on top-line growth, revenue maximization, geographic expansion, or on significantly altering their competitive standing.

If one acknowledges the pressing need for such added capacities, expertise and business model-altering alliances, then the question of whether traditional HEI consortia represent a mature plateau — or a promising launch pad — is an important one, to which I later return.

Merger Mania?

As noted, mergers of HEIs are a frequently discussed alternative — now and in previous periods of economic challenge and uncertainty. The long list of merged institutions, and their permanence, seems to indicate good prospects for viability and success.⁵

The potential benefits of mergers are several. For severely challenged HEIs, a merger can be the key to survival and avoiding insolvency, disrupted operations and closure. Mergers can facilitate the achievement of economies of scope, making it more cost-effective for the resulting HEI to offer the range of distinctive programs and services than for two separate institutions to do so. Merger also provides clear opportunities for achieving economies of scale and lowering fixed costs through consolidating academic, administrative and support assets.

A merger can improve brand, reputation and institutional identity for one or both HEIs. It can broaden and enrich courses, programs, degrees, activities and resources available to students and faculty. Mergers present critical opportunities (particularly when one of the institutions is financially troubled) to execute needed changes and difficult decisions. The post-merger integration process also provides opportunities to drive change, efficiency, alignment, reorganization and the achievement of economies.

When considering a collaboration, figuring out the costs are as important as touting the cost savings and new revenue. While the consortia may be a loss leader in the first years as start-up costs are absorbed, when does it start making a new profit or at least breaking even?

The Times of Higher Education (April 25, 2013) reported that Malcolm Tight, professor of higher education at Lancaster University, tracked the mergers and acquisitions between 1994-95 and 2009-10 in the United Kingdom. He found almost a third of academic institutions undergoing some type of merger since the mid-1990s. Thirty per cent of the 184 higher education institutions in existence in 1994-95 — 55 in total — had been involved in mergers by 2009-10, with a further 54 changing their names during the 15-year period.

Mergers can benefit students by avoiding disruptions to degree pursuit, and spill over to the communities in which HEIs reside, preserving economic activity and impact that are lost in instances of closure. In brief, a merger can breathe new life into one or both HEIs and open new chapters of opportunity, change, reconfiguration and redefinition.

Marital Realities

Interestingly, the literature on organizational mergers suggests a low percentage of success in the corporate sector, typically between 20 and 50 percent.⁶ While it appears that the figure may be higher for HEIs, mergers still present daunting limitations, risks and challenges to HEIs. And permanence of marriage is not always a sign of marital bliss and accord — nor that both partners view the relationship in the same light!

Though they occur, mergers of “equals” are not common. Often, one or both of the HEIs bring problems and challenges to the mix, sometimes as the primary catalyst for the proposal and ultimate relationship.

In some instances, merger is a last-resort alternative, arising from financial problems and late-in-the game decision making at one or both of the institutions. This can constrain options, alternatives and decisions — and can curtail the bargaining power of an ailing HEI. It can result in an alteration or loss of institutional identities and unequal status in the post-merger HEI for the weaker institution and its faculty and staff.

Like consortia, mergers are often influenced or determined by geographic proximity, limiting the options and choice sets of HEI partners. Similarly, as complex and time-consuming processes, mergers are typically bilateral and limited to two HEIs and whatever economies of scope or scale their size, offerings and operating models might provide.

“Troubled” mergers can require significant time to resolve constituent HEIs’ financial challenges, limiting short-term savings and financial benefits. For these and other reasons, mergers may extend the “payback” period and timeframe for achieving revenues, cost savings and efficiencies. In the worst instances, they may not result in notable changes to the overall cost structures of the post-merger institution and could, ultimately, result in closure or elimination of elements from one or both of the merged HEIs.

Mergers are complicated in terms of time and transaction costs and involve regulatory and accreditation issues and processes. They disrupt board governance — with one board of trustees disappearing or being absorbed into another — and create change and uncertainty in the already-complicated territory of faculty governance and representation. Thus, mergers typically have significant emotional and psychological costs for HEI faculty, staff and students.

A report (2012) by the Higher Education Funding Council for England argued that institutions often underestimate merger costs. Among other areas, colleges and universities must standardize administrative processes and salary and benefit structures. These costs can be quite significant when the merger is between unlike education institutions. Other costs, including opportunity costs, should not be ignored even if they are challenging to assess.

Mergers and acquisitions become more complicated when one of the potential participants has severe financial problems. The stronger institution is unlikely to take on budget deficits, a deteriorating physical plant, and large debt unless it feels that a turnaround is possible. This is no different than what happens in business.

When financially troubled St. Andrew’s Presbyterian College in North Carolina looked for a merger partner, it found Webber International University in Florida in 2011. Both institutions apparently thought that the cost savings from economies of scale and shared services and programs would compensate for St. Andrew’s perilous financial state that caused its accrediting body to drop the institution from membership.

The Wall Street Journal (July 6, 2015) reported that Mr. Baldasare remained head of the branch, and that the school, now known as St. Andrews University, retained most of its faculty and staff. “It was a great case study of people pulling out the stops for a tiny little nonprofit school,” said Bob Shireman, former deputy undersecretary in the Education Department.

An old adage is that if your stakeholders cannot get you on the substance of a decision, they will oppose you on the pace and lack of participation in the process. For example, in the case of Sweet Briar College — a closing, not a merger — the news was sudden, few people were involved in the decision besides trustees and consultants, and at least initially the reasons given for the closure were unconvincing. The unexplained fact that the college had a large endowment and was still closing prompted much of the opposition.

While mergers can save money, they require notable investments of financial, human and other resources to support and achieve integration and success. Post-merger integration challenges (cultural, organizational, political, structural and other) commonly arise, many of which can engender resistance and, ultimately, result in siloes. Finally, mergers are “permanent” and difficult to “undo,” with notable exit costs and barriers that can limit future options and flexibility.

Design Principles: Breaking New Alliance Ground

The critical need for more intensely collaborative, financially sustainable and competitive HEIs also calls for new forms of HEI alliance — somewhere between the seemingly “mature” innovation of HEI consortia and the complicated merger of two institutions. The next frontier of multi-HEI collaborations could be more substantial forms of strategic alliances and joint ventures that are built upon several critical “design principles” and:

- Are proactive, competition-oriented, and driven by motivated (but not failing or fully in-crisis) HEIs;
- Are multilateral, involving multiple compatible HEIs with shared needs and strategic objectives;
- Are not bound primarily by geography — and which might possibly increase the geographic reach of partner HEIs;
- Achieve notable cost savings, efficiencies, economies (of scale and scope), and integrations, through complementary or supplementary “fits” among partners;
- Provide substantial new expertise and capacity in critical staff, talent and functional areas;
- Drive program-specific and overall enrollment growth and increased revenues;
- Enable substantial business model changes, both academic and administrative;
- Provide alliance continuity and substantive decision authority via jointly owned and governed alliance entities that complement individual HEI boards;
- Provide flexibility and growth to HEI members, while reducing exit costs and barriers; and
- Improve the competitive positioning and strength of participating HEIs, individually and collectively.

Institutions are not proactive, competition-oriented, and so on. People are. An alliance needs a “champion” who is willing to inspire others to approve and then push the implementation. If not the president or chancellor, the champion needs “air cover” from top officials to inspire others to get onboard and to provide the champion from adverse consequences from the alliance’s opponents.

If such strategic alliance opportunities exist for HEIs, they will certainly require a greater vision of the possibilities, a better understanding of potential forms and functions, and knowledge of factors contributing to success.⁷

Educating HEIs in Alliance Strategy

HEIs alliances can, and should, be both extremely competitive and strategically collaborative. These twin objectives are captured in the robust body of literature on strategic alliances. The literature on the competitive, economic and organizational benefits of alliances is primarily — though not exclusively — based on for-profit industries. Yet, it has important implications and beneficial applications to HEIs and the higher education industry.

Much of the literature focuses on concepts of “strategic alliances” and an organization’s development of both “alliance strategy” and “alliance capacity.” This literature provides a useful vocabulary; considers the range of alliance forms and arrangements; examines the value, benefits and motivations; discusses strategies for managing risks; identifies key factors contributing to successful alliances; and explores their impact on competitive environments.

The advice of British statesman Henry John Temple, Ireland’s Third Viscount Palmerston, in 1848 that: “ We have no eternal allies, and we have no perpetual enemies. Our interests are eternal and perpetual, and those interests it is our duty to follow” applies to higher education today. Collaborations and alliances are means to an end and not ends in themselves. The theory has been that colleges and universities can offer a wider range of programs if they form partnerships. These programs are both academic and administrative, with information technology, library services, and international education as especially “hot” consortial possibilities in recent years. Still, if entering a consortium or entering an alliance turns out not to meet an institution’s goals, that institution must look to its own interests and not those of the collaboration.

Though the literature merits detailed consideration, my purpose is not to provide a comprehensive review of said literature, but rather to offer a few key concepts that seem to have value and applicability to HEIs facing the previously noted challenges.

Definition and Characteristics

An alliance is “a close, collaborative relationship between two or more firms” (in bilateral, trilateral or “constellations” of multiple entities) for the purpose of “accomplishing mutually compatible goals that would be difficult to accomplish alone.”⁸ Experts suggest that strategic alliances have three primary characteristics: First, the organizations retain their legal independence throughout the alliance. Second, they hold joint managerial control over key performance tasks and share the benefits thereof. Third, they contribute on an ongoing basis to strategic technology, products or offerings.⁹

Complementary and Supplementary Alliances

Alliances are of two primary types or bases, depending on the asset base and the resource fit of the partners.¹⁰ Specifically, they are either “complementary” or “supplementary” alliances.¹¹ A complementary alliance supports the sharing of different assets and resources, giving partners access to skills or expertise they do not otherwise have. It supports the achievement of economies of scope, in which efficiencies are achieved through variety and diversification, rather than volume.

A complementary alliance achieves a key goal: It aids an organization in accessing capabilities or assets that it lacks internally and which are difficult to acquire, are deeply embedded in organizations, are hard to retain, or would be too costly if obtained through acquisition or merger. Thus, a complementary alliance can create greater advantage and less organizational stress, require less integration, and provide greater flexibility.

A supplementary alliance supports the sharing or combination of similar assets, resources, skills and expertise. It helps to achieve economies of scale — supporting cost reductions, consolidation and improved efficiencies.¹²

A supplementary alliance can also achieve an important goal: the creation of “shared utilities.” These are jointly held functions, entities or platforms that are established by allied organizations to perform tasks or functions in which individual partners lack scale.

A familiar business example would be VISA. Banks created it as a shared platform to process credit-card transactions. The platform also resulted in defining the industry’s standards and protocols for integration.¹³ Higher education has successfully created some shared utilities — such as the Common Application and the National Student Clearinghouse — but not to the extent that exists in other industries. Similarly, while some HEI consortia have built shared utilities or achieved such benefits, it is an area of important opportunity for strategic alliance and joint endeavors going forward in higher education.

Benefits and Motivations

While the literature repeatedly addresses the basic cost savings and product and service quality that consortia primarily seek, it provides a more detailed consideration of the range and variety of the motivations and benefits of strategic alliances. These include specific motivations that spring from competitive, organizational, delivery and support, and marketing and sales goals. They are further summarized and described in Appendix 1.

The list of expanded motivations suggests a broader set of opportunities for HEIs to consider as they cultivate alliance capacity and strategies. Such

The literature is a useful starting point but while much of it is inspiring, it often is far too general in scope and content. Colleges considering alliances need as much specific information as possible about how to consider, design, and implement. Essentially, they need a business plan that details revenue and costs, risk, program, and marketing. This requires a significant amount of research that is often neglected. When one large state university, for example, developed an online alliance among state institutions to boost enrollment, they did not account for how many of the online students were already enrolled, thus negating much of the projected enrollment growth.

In a review of the literature in the *Journal of Higher Education* (Vol. 79, No. 6, 2008), Eckel and Hartley point out that strategic alliances are formed for a variety of reasons:

- Alliances open doors to markets by pooling financial and human resources, thereby producing new combinations of products, services, and expertise
- They extend capabilities, improve the delivery of services, generate greater economies of scale, and reduce expenses by linking complementary technologies or sharing facilities and capacities and jointly investing in new innovations, such as technology.
- Alliances facilitate the development of new ideas and products and allow participating organizations to “leapfrog” into new areas.

(Continued on next page)

an approach is consistent with the previously proposed design principles — and represents opportunities for the next generation of HEI alliances and collaborations for which I argue.

A Framework of Alliance Forms

So what does a more detailed landscape of possible strategic alliance forms for collective competition among HEIs look like? The literature sketches a landscape of potential alliance forms and the key variables related to each. It suggests a space on the continuum — somewhere between traditional consortia and mergers — where the proposed new models and opportunities for HEI alliances might exist.

A first step in the development of alliance strategies is for HEIs to identify and evaluate the types of alliances in which they are currently engaged, as well as to consider potential forms for expanded efforts. A hierarchy of alliance forms, synthesized from multiple authors and summarized in Appendix 2, provides a basic tool for both such analysis. It summarizes forms and their definitions, ranging from the lower to the upper categories in terms of complexity, risk and duration. It also outlines key distinguishing variables.

In reviewing the forms and presumed hierarchy, an HEI could consider several key questions, including:

- What is the overall level of our HEI's alliance competency?
- How far “up” the hierarchy or typology do our alliance strategies and activities range?
- In terms of further cost savings or quality improvements to programs, services and offerings, what further alliance forms could be envisioned and undertaken?
- Which forms might enable the achievement of newly envisioned alliance benefits? (See Appendix 1.)
- What alliance forms can have institution-wide application and most significantly alter fundamental HEI business model and functions?

Further Mapping an HEI Alliance Landscape and Considering Key Variables

Similarly, using additional guides and concepts from the literature, HEIs can further map the landscape of the industry, their competitive environment, and their strategic alliance positioning, as illustrated in Figure 1, which depicts a continuum of alliance forms and strategies and additional variables. Specifically, the continuum ranges along the “X” axis from “low” (or simple) to “high” (or complex) based on a variety of characteristics, including:

- The risk assumed by partners;
- The scope and complexity of the agreement; and
- The organizational structures created or required.

The height of the “Y” axis represents the duration of alliance forms, from brief and single-instance to prolonged or permanent.

This schema can be further developed and augmented (see Figure 2) to incorporate key factors and variables into the landscape, such as:

(Continued from previous page)

- Partners learn from one another since buying knowledge and expertise in the marketplace can be very expensive.
- Together, organizations may find it easier to monitor the changing environment and better understand emerging opportunities or risks.
- Alliances may also be formed to defend a current strategic position.
- An organization may join an alliance to gain legitimacy through association with others, particularly larger, visible, reputable, and prestigious firms.

A book in the Jossey-Bass series on *New Directions in Higher Education* (Dotolo and Strandness, 1999) discussed four conceptual approaches to collaborations that seek to increase cost effectiveness:

- *Share the risk.* Colleges share various forms of insurance, including property and casualty, liability, life and health, and worker's compensation.
- *Share the resource.* This occurs in functional areas such as equipment, libraries, service contracts, faculty, and administrative staff.
- *Do unto and for others.* One consortium member provides a service to the others for a fee that is especially attractive when one institution is much bigger. Depending on the service, unrelated business income tax may be levied. For example, a tax liability was incurred by a hospital doing laundry for other hospitals.
- *Expand your bargaining power.* This approach relies on larger volume purchases to increase bargaining and reduce costs. Utilities, supplies, services, and software are cited as prime examples.

In exploring cost effectiveness, many colleges distinguish between cutting costs and avoiding costs. The former attempts to deliver the same service more economically, e.g., three colleges eliminate two philosophy departments and related faculty positions. The latter adds or expands a service but at less cost than doing it alone, e.g., the three colleges hire one and share one new faculty member with a specialization in the philosophy of Hegel.

- The size, or number of alliance partners;
- The scope and scale of collaborative endeavors;
- The existence of a separate and jointly governed venture or alliance entity;
- The creation of a shared utility or utilities.

Strategic Sweet Spot?

As previously suggested, I believe that the segment or space along the “X” axis of the landscape/continuum that lies between consortia and merger (the vertical shaded space shown on Figure 3 and the shaded area on Appendix 2) represents a key conceptual and competitive space where important opportunities exist for exploring and developing HEI strategic alliances and joint ventures. This sweet spot is where multi-institution alliances could pursue and achieve many of the key design principles I have suggested.

And while this compelling territory is seemingly new to many HEIs, there are initial examples from which to learn and upon which to build. Moreover, it is an area into which existing consortia could be well positioned to “shift” and explore opportunities. It could be a space in which to realize the full benefits of alliance and merger, but avoid some of the downsides of the latter.

An Illustration and Specific Example

What might such “strategic system alliances” or joint ventures look like and how might they function? Here is an illustration:

Imagine three less-selective, tuition-driven, high “tuition-discounting” institutions, with a primarily liberal arts orientation and a moderate set of professional programs. One HEI has a strong health sciences programs, another offers a graduate engineering program and the third offers a doctorate in education.

One is located in New England, a second in the South and a third in the Midwest, with enrollments at each ranging between 800 and 2,000 students. One HEI is urban, one is suburban, and one is geographically isolated from metropolitan areas. All three have distinctive elements and offerings, but struggle to distinguish themselves in a crowded marketplace and have limited online programs. Their alliance strategy provides opportunities for both complementary and supplementary advantages.

The three HEIs retain their own identities and brands, but join together to create and share an undergirding “Excalibur University System,” a supporting entity designed to progressively integrate, consolidate and scale most administrative operations and to develop plans for academic integration. Each Excalibur institution retains its own governing board and regional accreditation.

Through shared task forces focused in specific functional areas, Excalibur first creates a shared set of back-office systems, merging their payroll, human resources, accounting, compliance, and other administrative services. One institution, however, has a strong general counsel’s office, which subsequently serves all three HEIs. Other unique and valuable assets possessed by one of the institutions are identified and become shared utilities for all three.

With pooled resources and a focus on growth and revenue generation, Excalibur also recruits top digital and marketing talent to a centralized marketing and enrollment management team, at salary levels that any one institution would be unlikely to achieve. Each HEI has a strategic growth plan, designed to increase enrollment and revenue, notwithstanding enrollment and discounting pressures in their regions — some aggravated by a surplus of HEIs and demographic decline.

Additionally, as later entrants and non-distinctive players in the online learning space, Excalibur HEIs work together to assemble and launch — through partnerships, joint technology and other means — a shared online learning platform, supported by an experienced instructional design and online delivery team. Cross-registration among member HEIs begins and increases.

Risk is a huge but underappreciated issue in higher education. For example, the trustee investment committee might brag about the portfolio’s income and gains but not disclose how much risk was assumed to achieve those returns. The risks here include liability for litigation and whether the partnership is responsible if one of its members violates a federal standard — Title IX and sexual assault comes to mind — or an accreditation requirement. Who is responsible if the alliance fails and leaves a large accumulated deficit?

In all instances, the efforts are focused on accelerated growth at each HEI to enable the achievement of scale and financial sustainability; increasing the HEIs' competitive standing, revenue and growth; and substantially altering individual HEI business models to expand capacity and talent and reduce cost and duplication. Increasingly and over time, complementary benefits providing economies of scope are achieved — as are supplementary benefits realizing economies of scale.

From Ideal to Real: The TCS Education System

Beyond the hypothetical, an increasingly prominent example that provides a model for consideration and further experimentation is the TCS Education System, launched in 2009.¹⁴ While it initially formed to serve the Chicago School of Professional Psychology, it has grown nationally to comprise five independent, nonprofit and accredited postsecondary institutions in three states: the Dallas Nursing Institute, Santa Barbara and Ventura Schools of Law, Pacific Oaks College, Pacific Oaks Children's School, and Saybrook University. Total enrollment currently exceeds 6,500 students.

Dr. Mark Schulman, president of Saybrook University, said joining forces with TCS Education System will allow his institution to continue its four-decade goal of using graduate education to help individuals discover their life's work and excel in it. "Together we have the capacity to help students bring about much needed change: transforming the health care system, improving mental health services, leading new kinds of organizations."
<https://www.saybrook.edu/about/media/news/tcs-education-system-and-saybrook-university-join-forces> [Accessed June 27, 2015]

In terms of IRS designations, the TCS alliance was organized as a tax-exempt, Type II supporting organization with, in the IRS's description, a "brother-sister relationship." Accordingly, it engages in activities to benefit its member HEIs and is controlled and directed by its own board.

TCS focuses on large strategic decisions and reserves specific rights and decisions for the system leadership. It requires a high level of commitment from member HEIs. A majority of the TCS trustees are sitting trustees of alliance member HEIs (which retain their own institutional boards), and additional TCS board seats include national experts. TCS has an executive cabinet that includes the presidents from each HEI, which directs and oversees shared operations.

TCS's goal was to serve the needs of several small, regional, tuition-driven professional schools, all with enrollments ranging between 1,000 and 4,000. It began by focusing on shared business functions to achieve greater scale and build significantly more talent and resources than a single institution could achieve or acquire on its own.

With time, and driven by integrated task forces examining jointly identified functional areas, TCS's shared functions and utilities have expanded. Specifically, TCS assumed primary roles of marketing, call-center support, finance, IT, and online program delivery services. It achieved back-office synergies that are largely invisible to students, but are of notably higher quality than single member HEIs could envision or achieve.

This hypothetical illustrates the importance of being clear about cost savings goals, and whether they are being achieved. This is sometimes hard to measure because any cost savings might be reallocated to other programs and priorities — not a bad outcome but one without total cost savings.

Another example was launched by a grant from the Mellon Foundation. Colby, Bates, and Bowdoin (CBB) Colleges joined together to develop new study abroad programs in London, Quito, and Cape Town for their students. Bowdoin managed the Cape Town Center while I was the chief financial officer. Issues that we had to address included:

- *Crisis management:* In an emergency situation involving a student or faculty member from one of the other two colleges not managing the center, who is in charge? For example, if a Bates student is injured in London, is Colby or Bates or the CBB program staff person responsible for contacting parents, dealing with the hospital, and other matters?
- *Liability:* Need for international insurance for faculty (especially when working in a program not managed by their "home" institution) and students, parental waivers, access to health care and local police, relations with American consulate.
- *Financial:* Start-up reimbursements? Should facilities be purchased or leased? How do we deal with currency fluctuations, restrictions on foreign ownership of property? Calculation of "profits" and losses, and application of overhead in sharing costs.
- *Credit/Grading:* Do student transcripts record all courses or only those taught by CBB faculty, including grades to be included in GPA?

Joining small to medium size institutions might well constitute a prime opportunity for consortia because of their lack of access to economies of scale and enrollment issues — both volume and tuition discounting — that make it difficult to cover their individual overheads.

Importantly, TCS resources and expert capabilities have driven and supported greatly needed enrollment growth, industry research, and marketing strength for member HEIs. As an alliance of diverse HEIs with distinctive missions and programs, it has realized both complementary and supplementary aims and has achieved economies of scale and scope.

Its approach and achievements are notable and reflect many of the proposed alliance design principles. In sum, TCS has demonstrated model feasibility in the critical opportunity space, or sweet spot, that I have described and which the alliance landscape tools included in the appendices illustrate.

Critical Questions

To be sure, a range of organizational characteristics and cultural and other barriers can impede HEIs from successfully defining and pursuing such strategic system alliances. Indeed, the “brother-sister” relationship pursued by the TCS system could be difficult for most HEIs to achieve. Each of the design elements and requirements would necessitate expert leadership of organizational change in participating HEIs and skill and effort in identifying appropriate “siblings” for such an alliance.

Further, HEI leaders and stakeholders may express concerns about institutional independence and raise tough questions regarding the envisioned means and ends. A few such questions might include:

Do such strategic alliances simply amount to the “corporatization” of postsecondary education?

There is much to be learned from other industries and their alliance behaviors. Moreover, senior leaders increasingly recognize the challenge of focusing primary HEI efforts on the core — chiefly academic — capabilities that make them unique and distinctive. Non-core and non-distinctive activities are prime opportunities for efficiencies, cost-reductions, and quality improvements by allying with entities that possess — or can help achieve — greater scale, resources and expertise. This will include critical, revenue-supporting roles and functions.

The trend data on HEI costs indicate that a notable percentage of the growth in HEI expenses has occurred in non-distinctive, administrative functions.¹⁵ Yet, achieving economies of scope and scale and making substantive cost and performance gains in such functions is challenging. Creating and utilizing new entities and shared capacities — in which corporate and business expertise can achieve both cost-reduction and revenue-growth — is a critical opportunity. Fundamentally, the goal is to support and benefit the sustainability of the core academic enterprise.

How are such strategic alliances different from what for-profit institutions have done in buying and consolidating individual campuses?

While some for-profit HEIs and systems generate controversy, several have demonstrated the benefits of consolidating, streamlining and upgrading both academic and administrative functions across multiple campuses and/or HEIs. Again, the integrity and quality of the academic programs must be the primary focus, but there are productive lessons to be gleaned from such approaches and experiences.

One benefit of a multi-institution strategic alliance or joint venture is that, like existing consortia, partner HEIs retain shared ownership and control. The HEIs also retain their institutional independence and identities, while upgrading other key capacities in ways they could not otherwise afford or achieve. Consolidation, streamlining and standardizing across “sibling” HEIs can provide opportunities and sustainable benefits.

Strategic alliance entities can help constellations of HEIs replicate and improve the positive aspects of what for-profit HEIs have achieved — in efficiencies, technology, marketing, student support and online delivery — and make it feasible for smaller, tuition-driven, endowment-poor and less competitive HEIs to more successfully compete against better-resourced competitors.

Another interesting example, though larger and more complex, is National University. According to Ry Rivard in *Inside Higher Ed* (2013), TCS is dwarfed by the National University System, on which it has modeled itself to some extent. National, which was formed in 2001, is like TCS in that it is focused on professional education, but it is much larger. It has about a dozen institutions (with National University the largest, at 23,000 full-time students), including John F. Kennedy University, which it added in 2008, and City University of Seattle, which it absorbed this year. National University has an endowment of about \$500 million.

“Corporatization” is one of those words that are used promiscuously without a specific definition or identification of their dangers to higher education. (Another example is “transparency.”) Business does influence higher education in the movement to find a new “business model,” and in revising the curriculum to make graduates more marketable and hence employable.

Lacking the financial and investment capital that has been available to many for-profit HEIs, such prospects would not exist for most HEIs. Strategic alliances can provide access to multiple forms of capital that HEIs will not otherwise be able to access.

How do strategic alliances differ from what higher education consortia do or have already accomplished?

As noted, the accomplishments of HEI consortia are notable and have definitively raised the bar for intentional cost-saving and quality-improving alliances. I argue for the deliberate and progressive expansion of such activities — and, particularly, for this expansion to include activities that create greater revenue-generating expertise and capabilities. I also argue for creation of a greater number of shared utilities and jointly-owned functions, entities and platforms to provide what individual or smaller groups of HEIs cannot accomplish at scale.

The goals for cost savings and quality improvement must be defined up front and tethered to the ground by performance criteria that define success. For example, how much money will be saved after the start-up costs are incurred? Such specificity lets members know when their efforts have been successful and bestow higher credibility on the alliance.

All alliances, it should be noted, exist to achieve the goals, aspirations and directives of their members. I strongly urge the best HEI consortia to actively expand their ambitions and business models, including spin-off entities that could serve and benefit larger numbers of HEIs beyond their current geographic scope. Their combined expertise is critical to the experimentation and the outcomes described here. Further, it is likely that there will be increasingly greater demand for the skilled professionals who direct them and have achieved success.

There are many public, multi-campus college and university systems that do not seem to have radically altered costs or competition. How do the proposed strategic alliances differ?

Many public multi-campus systems have strong records in integrating back-office functions, sharing resources, providing centralized services and other functions which can substantially lower costs and improve student experiences. Like consortia, they provide a good model, from which other strategic alliances can learn.

Besides sharing with other higher education institutions, consider other non-profit and even commercial institutions. Back office operations like accounting and payroll might be shared with a bank that has excess capacity.

As public systems can be primarily “political” creations, resistance to the mandates, priorities or functions of a central office can occur. The strategic alliances and joint ventures I describe would be voluntary and visionary, premised on shared ownership, objectives and a shared competitive orientation.

Admittedly, such HEIs might also encounter resistance and misgivings among faculty or staff — and attention to the leadership, governance and change process are critical. Substantive involvement of faculty and staff are essential, in addition to strong presidential and trustee leadership.

What if elite, financially stable and endowment-wealthy HEIs create exclusive strategic alliances and joint ventures — “clubs”— that further disadvantage resource-poor institutions that are not competitively well positioned?

The fundamental truths of strategy and competition are that strength often begets strength and that successful strategic alliances require both resources and relatively strong and desirable partners — the stronger, the better.

It is possible that elite and well-heeled HEIs could create competitive alliances built upon their notable academic strengths, reputations and resources. Some instances of this have occurred, including online-learning ventures. Yet the recent history of competition in American higher education suggests that for-profit and tuition-driven independent, nonprofit institutions have consistently been the most resourceful, market-driven and competitive. My argument challenges the best of those institutions to continue to be so in new ways.

Rich institutions are least likely to seek strategic alliances because they do not need them to meet their enrollment goals or balance their budgets. Obviously, this is not universal — witness the Five College consortium — but when survival is at stake for the poorer institutions, they are more likely to seek alliances.

I firmly believe that such HEIs have the ability to purposefully and aggressively pursue strategic alliances that achieve the primary design criteria outlined herein. Success in such endeavors is never ensured, however, regardless of the resources or reputations. Such alliances and joint ventures require a number of key ingredients, several of which I have previously noted and others described in the section below.

Conclusion: HEI Alliance Imperatives

What are the important factors that might catalyze the ability of HEIs facing sustainability challenges to proactively and successfully pursue new forms of strategic alliances that comport with the proposed design criteria? A few thoughts include:

Choose Collective Competition

As one alliance expert urges, organizations facing high complexity, uncertainty, and fast rates of change should favor building strategic “constellations” of allies, rather than going it alone.¹⁶ Most HEIs are competitive in the basic sense of attracting student enrollment and in knowing the specific HEIs against which they compete. They are also collaborative with neighbors and, through consortia, demonstrate their ability to temper the pursuit of complete institutional independence and inclinations to achieve comprehensive offerings alone.

Yet, most HEIs will need to deliberately bolster both competitive and collaborative capacities: They should understand and cultivate the posture of “collective competition.”¹⁷ This will involve real strategic alliances with the intent of significantly improving the competitive stance of like-minded institutions and of altering the competitive landscape in their favor.¹⁸ For many, the prospects for long-term competitiveness, financial sustainability and real business model change will depend upon such an approach.

Get Beyond Geography

Geography has been a key enabler of HEI collaboration and consortia — and it should be used to maximum benefit. HEIs will need to look beyond their immediate geography and neighbors, however, to identify and cultivate optimal constellations of ally HEIs. This has long been true in alliances among for-profit entities and in healthcare, made increasingly possible via technology. Reaching beyond geographic confines can enable the achievement of complementary and supplementary fits with like-minded HEIs, leading to economies of scope and scale, as well as to opportunities to attain other noted alliance benefits and motivations (including accessing new students and markets).

Build Alliance Capacity

HEI trustees and leaders must deliberately cultivate alliance capacity at multiple institutional levels.¹⁹ First, HEI leaders must foster the understanding, vision, attitudes, skills and resources that enable development and execution of multilateral alliances.²⁰ This requires institutional self-knowledge and awareness, borne out of detailed and critical reviews of the HEI’s distinctive strengths, assets, needs and weaknesses. “Know thyself” must be a data-driven process by which stakeholders attain a clear enough picture of the HEI’s situation to accept the need for change, alliance and innovation. This will require skilled leadership from presidents, trustees and administrators — with due consideration of the needs and participation of multiple HEI stakeholders, particularly faculty members.

Further, HEI presidents should create a specific role or formally task a senior, cabinet-level leader to function as the institution’s “chief alliance officer.” In addition to facilitating the described institutional self-examination process, that individual would lead a full review of alliance capacity, resources, current activities and possibilities (ideally, aided by the typology in Appendix 2), and have ambassadorial duties to engage expert advisors and ally HEIs.

Second, there are important roles for the large U.S. philanthropies focused on higher education and for higher education’s multiple industry and sector associations (including the Washington, D.C.-based Higher Education Secretariat organizations). They can support further refinement of models for multi-institution strategic alliances and joint ventures, and provide HEIs with consulting support and expert advice from alliance experts, including those from the corporate sector.

This position is critical. Remember the advice that “duties that are the responsibilities of everyone soon become the responsibilities of no one.” Higher education learned this lesson on priorities such as diversity and information technology which eventually became institution-wide senior officers. Having the “chief alliance officer” report directly to the president or chancellor provides visibility and authority but the institution must be seen to be solidly supportive of alliances if the position is to be effective.

Philanthropies and the national and sector-specific higher education organizations can also serve as brokers and intermediaries by providing meetings and a platform to facilitate conversations among interested HEIs. They can provide and identify possible seed capital to support bold multi-HEI joint venture and system alliance business plans that pursue the primary alliance design criteria previously noted.

Finally, as mentioned, the most expert and advanced HEI consortia, which have developed notable expertise, capacity and business acumen, should likewise be supported in expanding their scope and repertoire, serving as launch pads for new alliances and joint ventures.

Seek Shared Utilities and Top Talent

Acting alone, most HEIs are simply unable to achieve economies of scale in both business/administrative and academic areas. Thus, a primary ingredient of competition-altering, strategic HEI alliances is the creation of shared utilities: jointly held entities and platforms providing services and operations that achieve scale, savings, quality and expertise at levels most sustainability-challenged HEIs cannot currently envision, much less achieve.

Many such HEIs struggle to attract top talent with cutting-edge skills in business-critical areas such as labor and market research; digital marketing; admissions and enrollment management; administrative technology; academic technology; and program delivery. Shared utilities staffed with top talent can support the achievement of scale, execution of high value-added, competitive and revenue-generating activities — as well as letting go of costly, non-distinctive and low value-adding activities where mediocrity mires many.

With luck, such jointly owned entities and shared utilities might evolve into a new generation of trusted, top-notch, scale-achieving higher education management companies, to which HEIs of all types and in all circumstances can further outsource important functions.

Engage the Higher Education Innovation Ecosystem

Ours is a compelling and opportunity-filled time: The higher education-related start-up environment and innovation ecosystem is larger and more active than ever before. Talented, technology-fueled, and fast-moving start-ups are actively vying to serve — and certainly disrupt — our industry space, supported by growing infusions of angel investment and venture capital from around the globe.

Such start-ups and innovators will continue to drive the reconfiguration of the higher education value chain and of HEI's fundamental processes and activities. Strategic alliances of HEIs seeking shared utilities, top talent, and the best technology should engage directly with these outside disruptors to seek partnerships, preferential investor status, and product and service design input — and to lock in first-mover advantages.

With significant support from the Mellon Foundation and other sources, the three CBB libraries — Colby, Bates, and Bowdoin — shared resources for 20 years, including reciprocal borrowing privileges, automating and linking their catalogs, tape loading periodical indexes, volume purchasing, and videoconferencing technology. The three colleges also cooperated in language teaching technology and use, and offered some administrator training programs. For example, they held a joint training session for 50 participants on recruiting employees, with the human resources staffs serving as trainers. Colby sent employees to Bowdoin for harassment training and TIAA-CREF and Bowdoin employees went to Colby to review benefit plan compliance issues.

Whenever your institution accepts funding or help from others — the government, corporations or nonprofits — be careful that any “strings” attached in terms of restricted uses of the funds or reporting requirements do not impede your alliance.

Many in higher education have an irrational prejudice against employees and applicants from business and even other types of nonprofits. Focus on what they can do and not where they did it. At Guilford College, for instance, the top two officers in the finance division came from hospitals. To be sure, they will need orientation and mentoring about colleges and universities but this is a small inconvenience compared to the skills they bring.

Higher education is risk averse, yet innovation often involves trial and error. Immediate failure should not shut down the effort but rather inspire research on what went wrong and how to correct it. Obviously, this experimental attitude involves risk and cost but seems compatible with the innovation ecosystem surrounding higher education today.

Pursue Multiple Design Criteria

If new alliance approaches are to be of advantage to the HEIs most concerned with financial sustainability, it will be critical to pursue and achieve as many key design criteria as possible. Simply put, “The more, the better.”

The combination of such criteria can surely be further informed by HEIs and leaders with substantial experience in consortial collaborations and by those that earnestly pursue multi-HEI strategic alliances and/or joint ventures of the type described and illustrated.

The primary significance of such criteria – however articulated or informed by experience – is this: the critical need for HEIs to deliberately move beyond too-narrow, supplementary and incremental collaborations that leave primary functions and activities unaltered, resources and capacity inadequate, and growth possibilities unfulfilled.

Learning to walk before running is important, however. HEIs must build alliance strategies and capacities with time and experience. Success is not guaranteed and, beyond specific criteria or potential allies, HEI leaders will face real and day-to-day challenges in managing changes in organizations in which multiple possible impediments exist.

A Strategic, Shared Future

Given the likelihood of continued and accelerating change in the higher education industry, proactive and ambitious alliance responses by vulnerable HEIs are needed. Will there continue to be HEI closures? Yes. Will there be more HEI mergers? It is quite likely. Will all multi-HEI strategic alliances or joint ventures succeed? No. As in other industries, there are successes and failures.

Most HEIs have unique strengths and assets. What an HEI might lack, or is unable to achieve by itself, should be viewed as an invitation and opportunity to explore an alliance. The imperative is for HEIs to not work alone – and to find alliance opportunities that exceed current and common collaborative solutions.

This is a critical point. One size does not fit all. The programs and services capable of being shared come first. How you structure the sharing as a merger or a strategic alliance is a secondary issue. Do not let the structure get in the way of gaining the benefits of doing more together.

About the Authors

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Thomas has been a faculty member, adjunct professor, and lecturer at several universities and served as trustee and vice chair of the board of Worcester State University. He earned his BA in philosophy from Brigham Young University and master’s degrees in higher education from Teachers College, Columbia University and Harvard University. He earned his doctorate in education and social policy from Harvard University and an MBA from Boston University.

Kent John Chabotar is president emeritus of Guilford College, a position he held from 2002 to 2014, and is a professor of political science there. From 1991 to 2002, he was vice president for finance and administration and treasurer at Bowdoin College. Since 1983, Chabotar has served on the faculties of the Harvard Institutes for Higher Education summer executive programs. Previously, he was on the faculty at the Harvard Graduate School of Education, associate professor of management at the University of Massachusetts, and assistant professor of political science and coordinator of public administration programs at Michigan State University. Chabotar received the Fussa Distinguished Teaching Award at Harvard and the Distinguished Educator Award for teaching excellence at Michigan State University.

Chabotar earned his BA in political science from Saint Francis University and MPA and Ph.D. degrees in public administration from the Maxwell School of Citizenship and Public Affairs at Syracuse University.

Appendix 1: Summary of Benefits and Motivations for Alliance Strategy²¹

Motivations, Goals and Benefits of Strategic Alliances

Competitive

- Alter industry's competitive landscape
- Improve organization's competitive positioning
- "Strength in numbers"

Economic

- Reduce costs
- Achieve economies of scale and/or scope
- Grow revenue
- Share risk

Organizational

- Build or combine momentum
- Drive culture change
- Achieve synergies

Expertise and Skills

- Acquire learning and knowledge
- Improve skills and expertise
- Expand process improvements

Technology and Intellectual Property

- Acquire technology
- License technology
- Acquire R&D capabilities
- Increase knowledge generation and transfer

Design and Production

- Increase product (service) design and development capability
- Improve/expand design, production, operations, efficiency
- Expand product (service) knowledge and offerings
- Improve or integrate sourcing network and supply-chain management

Delivery and Support

- Expand distribution, delivery and fulfillment
- Shorten time to market and/or customers
- Improve knowledge of customers
- Expand service knowledge or capability (customer support, engagement and satisfaction)

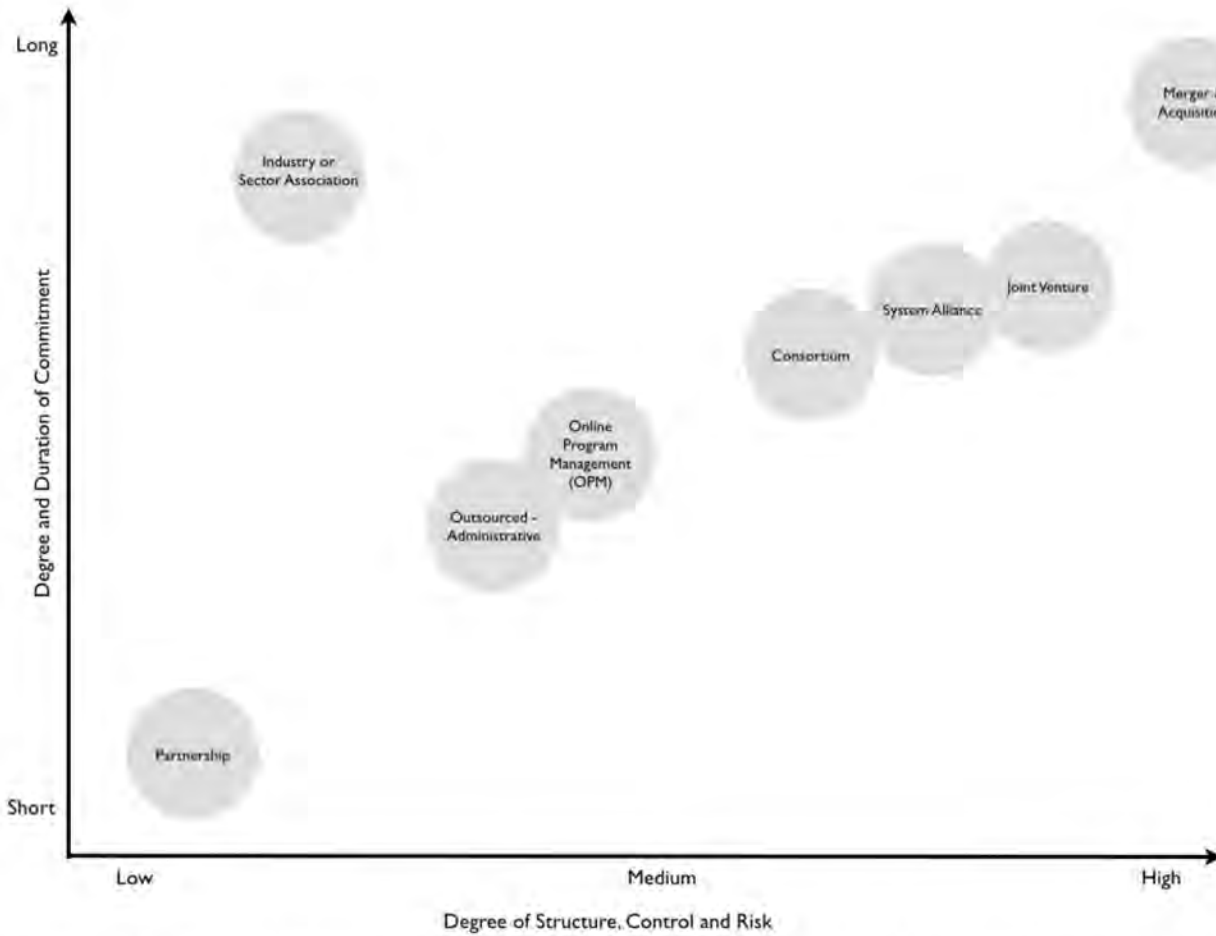
Marketing and Sales

- Expand marketing reach or capabilities
 - Grow or improve brand(s) and awareness
 - Increase sales, sales productivity and market share
 - Link markets or expand geographic reach
 - Reach new market segment (e.g., Spanish speakers)
-

Appendix 2: A Hierarchy of Collaboration Strategies and Alliance Forms²²

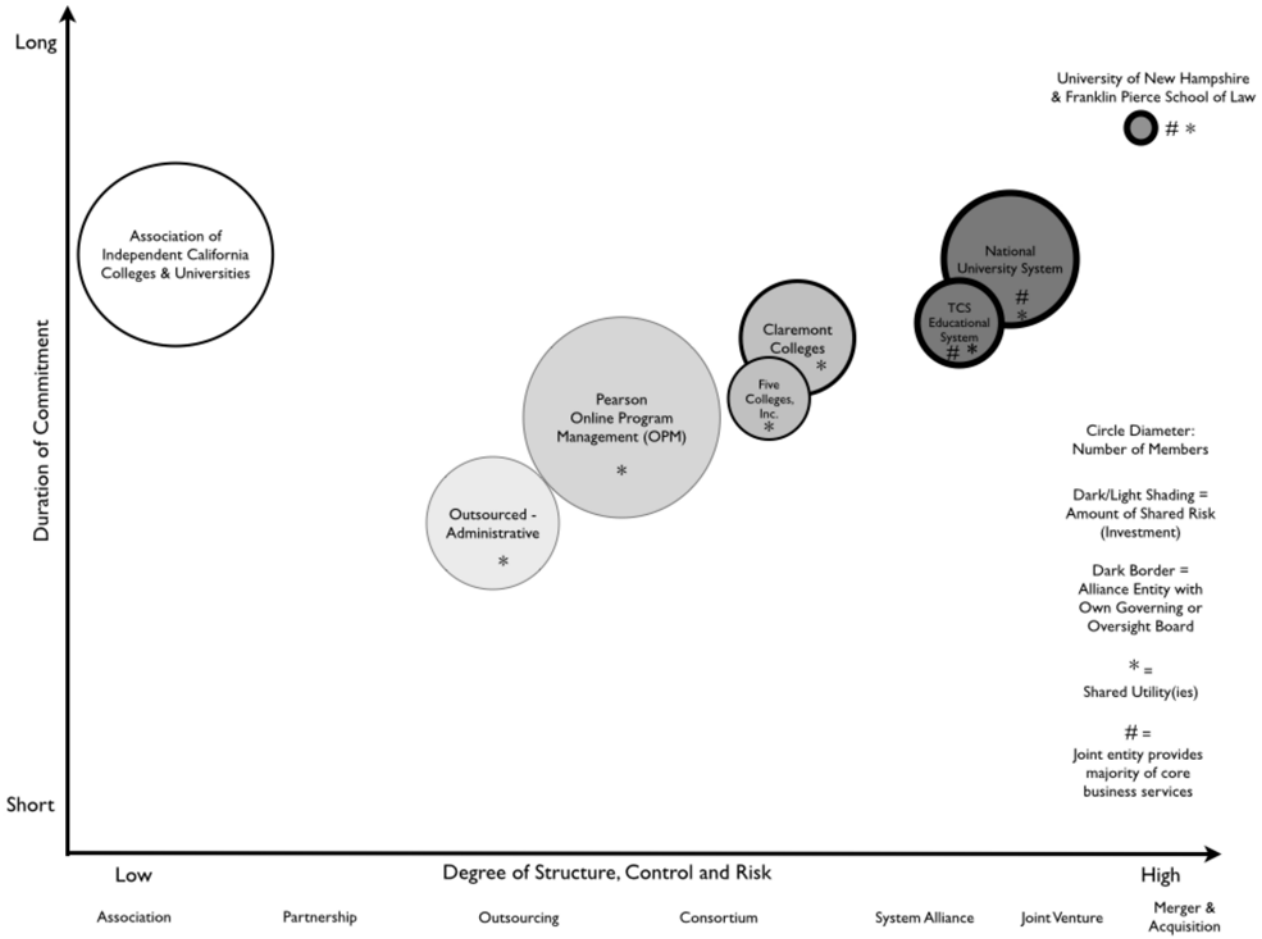
Forms	Description
Merger or Acquisition	One entity assumes control of the assets of a second. Through ownership rights, it directs and coordinates action of the combined entities
System Alliance or Joint Venture	A legal entity, jointly owned by two or more organizations, to perform specific functions and activities for its parent entities
Equity Investment	An organization acquires a share, either majority or minority, of a second entity via a direct stock purchase
Strategic Cooperative Agreement	Contractual networks with shared, multi-party strategic control and shared performance outcome responsibilities, with collaboration on key strategic decisions
Consortium	Two or more entities working to pursue common objective(s), each responsible only for contracted obligations and independent in all non-consortial operations
Cooperative	A coalition or collective of entities that pool, manage and coordinate shared resources
R&D Consortium	Inter-entity agreements supporting collaborative research and development, shared capabilities and findings in dynamic science and technological fields
Franchising	Granting (or acquiring) use of brand identity and core services (by specific geographic zones) with prescribed pricing, operations, marketing and product/service standards
Licensing	Granting (or acquiring) rights to use proprietary technology, processes or other assets through royalty or fee payments
Joint Marketing and Distribution	Multi-partner agreement to market and distribute one another's offerings and services to prospects and customers
Outsourcing (and Private Label)	Replacing internal products and services with those of an external source; "labeled" or packaged with the retailer's name, not the manufacturer
Supplier or Supply-Chain Network	Real-time scheduling, linkage and integration with suppliers on price, supplies, production and delivery processes
Industry Standards Group	A group that seeks agreements among member organizations, related to specification and adoption of technical standards
Action Group	Coordinated, short-term arrangement for lobbying and influencing opinion, actions and public policymaking
Buyer & Seller	Direct, one-to-one, arm's-length transactions between organizations, coordinated by the price mechanism (single and recurring transactions)

Figure 1: Mapping the Higher Education Alliance “Landscape”



Adapted from Spekman, Robert E., and Lynn A. Isabella. Alliance Competence: Maximizing the Value of Your Partnerships. New York: Wiley, 2000, pp. 36, 41.

Figure 2: Mapping the Higher Education Alliance “Landscape”: Illustrating Key Variables



Adapted from Spekman, Robert E., and Lynn A. Isabella. Alliance Competence: Maximizing the Value of Your Partnerships. New York: Wiley, 2000, pp. 36, 41.

Figure 3: Mapping the Higher Education Alliance Landscape: Sweet Spot for Strategic System Alliances?



Adapted from Spekman, Robert E., and Lynn A. Isabella. Alliance Competence: Maximizing the Value of Your Partnerships. New York: Wiley, 2000, pp. 36, 41.

Endnotes

- 1 Examples include: Azziz, Ricardo. "Higher Education for the Future: Plan B - Where Art Thou?" *The Huffington Post*. February 25, 2015.
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Strategic alliances that are more expansive than consortia but less risky than mergers

Submitted by Doug Lederman on November 4, 2015 - 3:00am

The idea that relatively few colleges and universities can thrive entirely on their own has taken hold in several quarters recently, as financial and demographic woes squeeze many institutions' bottom lines. But while predictions of mergers and consolidations [1] proliferate, so too does evidence that combining colleges [2] -- and even close collaboration [3] -- is hard to pull off even when it seems to make good sense [4].

A new report from the TIAA-CREF Institute [5] endorses the thesis that many higher education institutions will need to collaborate meaningfully to function well in the future, and that some of the traditional ways of working together -- like the many successful consortia that focus on joint services -- may not work for colleges that aren't close geographically or that seek more dramatic changes in their business models.

But its author, Michael K. Thomas of the New England Board of Higher Education, also concedes that mergers are "challenging terrain" on which many would-be marriages can hit potholes -- or sinkholes.

Instead, the report argues that more institutions should aim for what Thomas calls a "sweet spot" that is more flexible and sweeping than most consortia but less threatening and risky than mergers: strategic alliances in which they merge some of their some administrative functions (while retaining their distinct identities and structures) to both reduce costs and give them more capacity than colleges would have on their own.

Dealing With Difficulties

Like most observers envisioning new structural models for colleges and universities, Thomas was motivated to think about new approaches because of the financial and other strains he sees around him. "I'm having detailed conversations with lots of institutions in my region about their long-term sustainability," he said. "Small-scale institutions, those under 1,200 to 1,500 students, are particularly wondering about their financial sustainability," and yet many aren't well positioned to expand on their own.

What are their options?

Many such colleges are involved in consortia of various kinds [6], and successfully so -- including longstanding arrangements like the Claremont Colleges in California and the Five College Consortium in Massachusetts, and newer partnerships like the Council of Independent Colleges' Consortium for Online Humanities Instruction [7]. Colleges could and should pursue more consortial arrangements, Thomas writes.

But while most such affiliations help institutions shave internal costs by collaborating on various administrative services, they typically work only for colleges near one another geographically, and focus mostly on "functions [that are] adjunct or add-ons to primary [institutional] models, achieving primarily economies of scope," Thomas writes.

On the other end of the spectrum is the prospect of mergers. Moody's Investors Service predicted in September that the number of higher education mergers or consolidations would triple over the next few years, but that's from a small base. And Inside Higher Ed's archives [8] include regular articles on the likelihood of more mergers -- and yet the numbers remain comparatively small.

That is true in public higher education because of the political difficulty of closing institutions (as campus employees and local legislators typically clamor to save the local college no matter how grave the situation) and on the private side because alumni and other advocates cherish, for good reason, the traditions and values of their institutions.

And in both spheres, mergers are incredibly complex and time-consuming, because most of the time they result in absorptions (and disappearance of one party) rather than a joining of equals.

At last week's SUNYCON meeting [9] sponsored by the State University of New York, a panel of campus leaders and others discussed [10] their efforts to make public university systems more efficient and effective, and why they did (and didn't) turn to mergers as a strategy. Even Hank Huckaby, who as chancellor of the University System of Georgia has much more aggressively (and, so far, successfully) consolidated campuses, warned others that mergers are "not the panacea for everything" and described them as "very, very difficult, which is why so many efforts have failed." Huckaby said there were "800 to 900 discrete decisions" that had to be made in each of the six, two-institution mergers his system has undertaken so far.

Leaders of the University of Maine and University of Louisiana systems -- both of which have faced severe financial strain and might be seen as logical candidates for merging campuses -- said they were avoiding that approach. "Mergers and acquisitions for mergers' sake isn't very sound," said Sandra Woodley, president of the University of Louisiana System.

"Mergers typically have significant emotional and psychological costs for [higher education institution] faculty, staff and students," Thomas writes in the TIAA-CREF paper.

A Third Way

If consortia are often too limiting and mergers frequently too fraught, what else are institutions -- especially those that feel pressure to change, but aren't desperate -- to do?

Thomas's approach, drawn from the sorts of strategic alliances more common in fields other than higher education, favors what he calls "strategic system alliances" in which institutions, ideally, find partners that complement or supplement (or both) their own strengths and weaknesses. (Complementary alliances give an institution access to capabilities or assets it doesn't have or can't create on its own, while a supplementary alliance typically results in the sharing of similar assets, to

achieve greater scale.)

To help readers get their heads around the concept, Thomas offers an example. Three not-very-selective private nonprofit colleges, between 800 and 2,000 students each, and with a mix of liberal arts and professional programs. One is in New England, one in the South and one in the Midwest; one suburban, one urban, one rural; one has a strong health sciences program, one a graduate engineering program and one a doctorate in education.

The three join to create the Excalibur University System, through which they (over time) "integrate, consolidate and scale" many of their administrative functions, but they retain their own governing boards and administrative structures. They merge their human resources, accounting, payroll and compliance operations, while one of the institutions' general counsel's office ultimately represents all three.

The central entity, capitalizing on some saved money, recruits experts in marketing and enrollment management that none of the colleges individually would have been able to afford. They build a shared online learning platform, and cross-registration between the campuses' academic offerings grows.

"In all instances, the efforts are focused on accelerated growth at each [institution] to enable the achievement of scale and financial sustainability; increasing the [institutions'] competitive standing, revenue and growth; and substantially altering individual [institutional] business models to expand capacity and talent and reduce cost and duplication," the report states.

Thomas provides a real-world example, too -- the TCS Education System, which *Inside Higher Ed* described in an earlier article [11]. The multicampus system serves several professional schools, and its governance structure has encountered some friction from accreditors [12] as it has sought to find its way. That is likely to be the case the closer such arrangements get to the "academic side of the house," Thomas said, and TCS's path makes clear that nothing about having institutions work together is easy. "It's not like putting a bunch of Legos together," he said.

But as colleges and universities search for viable paths forward, strategic alliances should be among the approaches they consider, he said.

"Given the likelihood of continued and accelerating change in the higher education industry, proactive and ambitious alliance responses by vulnerable [institutions] are needed. Will there continue to be ... closures? Yes. Will there be more ... mergers? It is quite likely. Will all multi-[institution] strategic alliances or joint ventures succeed? No. As in other industries, there are successes and failures," Thomas writes. "Most [institutions] have unique strengths and assets. What an [institution] might lack, or is unable to achieve by itself, should be viewed as an invitation and opportunity to explore an alliance. The imperative is for [institutions] to not work alone -- and to find alliance opportunities that exceed current and common collaborative solutions."

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Links:

[1] <https://www.insidehighered.com/news/2015/09/28/moodys-predicts-college-closures-triple-2017>

[2] <https://www.insidehighered.com/news/2015/08/05/college-merger-negotiations-are-long-and-complicated>

[3] <https://www.insidehighered.com/news/2014/01/10/liberal-arts-colleges-pool-their-resources>

[4] <https://www.insidehighered.com/news/2015/07/07/colleges-struggle-some-look-partnerships-and-mergers-relief>

[5] https://www.tiaa-crefinstitute.org/public/pdf/between_collaboration_and_merger.pdf

[6] <http://national-acl.org/>

[7] <https://www.insidehighered.com/news/2014/03/19/consortiums-and-collaboration-abound-small-college-sector>

[8] <https://www.insidehighered.com/search/site/mergers%20%2B%20colleges>

[9] <https://www.suny.edu/sunycon/2015/>

[10] <http://livestream.com/hvccstreaming/SUNYCON2015/videos/103286073>

[11] <https://www.insidehighered.com/news/2013/09/30/saybrook-joins-growing-nonprofit-education-system-possible-new-model-higher-ed>

[12] <https://www.insidehighered.com/news/2015/04/08/regulators-grapple-questions-about-independence-private-colleges-nonprofit-system>

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Possible guiding principles for analysis and consideration of options for greater coordination between Johnson State College and Lyndon State College, as well as Community College of Vermont and Vermont Technical College:

- Maintain multiple vibrant campuses, each with its own character and separate academic accreditation by NEASC (New England Association of Schools and Colleges).
- Increase opportunities for access to high quality academic programming.
- Preserve or improve academic and support services for students.
- Provide sustainable financial savings in overall institutional operations.
- Avoid duplication of academic programs, while optimizing access to instruction.
- Create meaningful potential for economies of scale and scope.
- Streamlining administrative services, while maintaining or improving service quality.
- Maintain or enhance involvement and contributions to regional economic and community development.

5. Date of Next Meeting:
Thursday, February 11, 2016
Office of the Chancellor, Montpelier, VT