

# Medical and Healthcare

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# Medical & Healthcare

## At a Glance

- **38,000+ students** and **86,000+ alumni** from 5 medical and healthcare institutions
- **1,500+ clinical relationships** with healthcare systems and nursing organizations
- Serving a **diverse market**/demographic of students in the medical and healthcare fields
- **90% plus medical residency** attainment rate for both medical schools
- Strong **positive student outcome** trends: NCLEX & NAVLE scores as well as residency attainment
- Each institution is in **growth mode** and portfolio has stabilized post-hurricanes Maria and Irma
- Early and favorable signs of **value from cross-vertical effort**:
  - Dual degree programs
  - Joint clinical negotiations
  - Leveraging technology investments and education expertise

## Vertical Investment Highlights

- Collectively, the largest medical “institution” in the U.S. market, offering economies of scale and broad market insight
- Positioned to address the significant demand for healthcare programs and graduates
- Student outcomes continue to improve



**ROSS UNIVERSITY**  
SCHOOL OF MEDICINE



American University  
of the Caribbean  
School of Medicine



**ROSS UNIVERSITY**  
SCHOOL OF VETERINARY MEDICINE



**CHAMBERLAIN**  
UNIVERSITY



**MEDICAL EDUCATION  
READINESS PROGRAM**

# Positioned to Capture Market Demand



<sup>1</sup> Source: Bureau of Labor Statistics Occupational Outlook Handbook. <sup>2</sup>Source: American Association of Medical Colleges, November 2017.

<sup>3</sup> Source: <https://revcycleintelligence.com/news/less-than-a-third-of-docs-owned-independent-practices-in-2018>.



# CHAMBERLAIN UNIVERSITY

- **31,000+ students** enrolled across all programs
- Largest Bachelor of Science in Nursing program in the U.S., offered at **22 campuses in 15 states**
- Online post-licensure nursing and graduate programs represent two-thirds of student enrollment
- 60,000 alumni nationwide; **1 in 36 working nurses is a Chamberlain University graduate**
- **Chamberlain Care** approach is unique and differentiated

# Chamberlain University Degree Programs and Options

College of Nursing		College of Health Professions	
 <p><b>BSN</b> </p> <p>BACHELOR OF SCIENCE IN NURSING DEGREE PROGRAM</p>	 <p><b>MSN</b> </p> <p>MASTER OF SCIENCE IN NURSING DEGREE PROGRAM</p> <ul style="list-style-type: none"> <li>EDUCATOR SPECIALTY TRACK</li> <li>EXECUTIVE SPECIALTY TRACK</li> <li>FAMILY NURSE PRACTITIONER SPECIALTY TRACK</li> <li>HEALTHCARE POLICY SPECIALTY TRACK</li> <li>INFORMATICS SPECIALTY TRACK</li> </ul>	 <p><b>MPH</b> </p> <p>MASTER OF PUBLIC HEALTH (MPH) DEGREE PROGRAM</p>	
 <p><b>RN to BSN</b></p> <p>RN TO BSN OPTION</p> <hr/> <p>RN-BSN to MSN OPTION </p>	 <p>NURSING CERTIFICATES</p> <p>POST-BACCALAUREATE</p> <p>POST-BACCALAUREATE CERTIFICATE IN LEADERSHIP FOUNDATIONS</p> <p>GRADUATE CERTIFICATES</p> <p>FAMILY NURSE PRACTITIONER</p> <p>HEALTHCARE POLICY</p> <p>NURSING EDUCATION</p> <p>NURSING INFORMATICS</p> <p>NURSING LEADERSHIP FOUNDATIONS</p> <p></p>	 <p><b>DNP</b> </p> <p>DOCTOR OF NURSING PRACTICE DEGREE PROGRAM</p> <p>HEALTHCARE SYSTEMS LEADERSHIP SPECIALTY TRACK</p>	 <p><b>MSW</b> </p> <p>MASTER OF SOCIAL WORK (MSW) DEGREE PROGRAM</p>



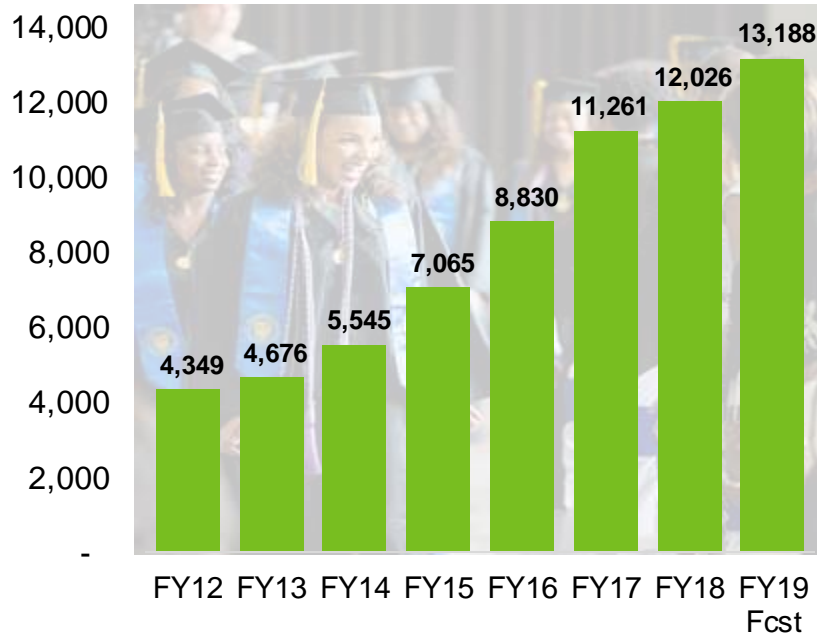
On-site



Online

# Chamberlain Has Built and Scaled Market-Leading Programs Leading to a Large and Influential Alumni Base

Chamberlain Graduates by Year



#1 IN TOTAL ENROLLMENT

#1 IN ENROLLMENT PRE-LICENSURE  
**BACCALAUREATE NURSING**

#1 IN ENROLLMENT IN **MSN-FNP** PROGRAMS

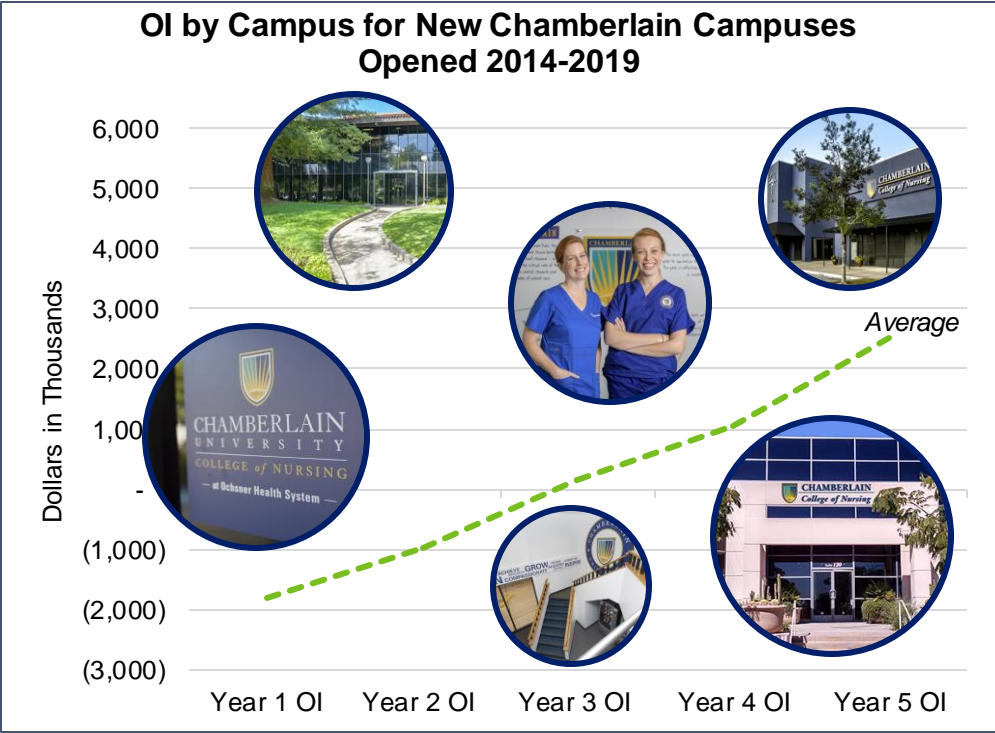
#2 IN ENROLLMENT IN **RN TO BSN**

#2 IN ENROLLMENT IN **MSN** PROGRAMS

#2 IN ENROLLMENT IN **NON-CLINICAL  
MSN** TRACKS

#3 IN ENROLLMENT IN **DNP** PROGRAMS

# Chamberlain's New Campuses on Average Reach Profitability in Year 3



# 60+ Healthcare Development Specialists with Collaborative Relationships at 920 Healthcare and Educational Institutions, Colleges and Associations







- Located in St. Maarten with ~1,400 students, returned in full August 2018, followed by a return to new student enrollment growth
- Achieved record 90% residency attainment rate in 2019, with nearly 300 AUC graduates matching in 38 states and 24 specialties
- Campus in U.K., in partnership with University of Central Lancashire, expecting first students in September 2019. Successful completion provides path for Commonwealth students to practice in the U.S.





## ROSS UNIVERSITY

SCHOOL OF MEDICINE

- January 2019, approximately 1,500 basic sciences students relocated to Barbados; total current enrollment at RUSM is 3,000
  - New academic center with state-of-the-art infrastructure
  - Student living and learning center
- Achieved record 90% residency attainment rate in 2019
- Signed articulation agreements with HBCUs and HSIs create new channel for student acquisition

**14,000+**  
ALUMNI

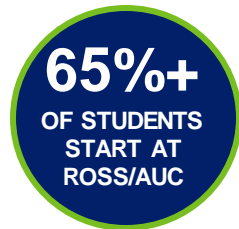
**60%**  
PRIMARY CARE  
PRACTITIONERS

**43%**  
PRACTICE IN HC  
SHORTAGE  
AREA



## MEDICAL EDUCATION READINESS PROGRAM

- Applicants are admitted to AUC and RUSM, pending successful completion of one semester MERP program
- Designed for student success in medical school:
  - Strong basic science foundation
  - Cultivate good study skills
  - Build strong peer networks for medical school
- Data has shown that undergraduate GPA and MCAT scores are not statistically significant predictors of medical school success, but MERP grades are a strong predictor





# ROSS UNIVERSITY

SCHOOL OF VETERINARY MEDICINE

- **AVMA accreditation** fully-renewed through 2026
- Largest AVMA accredited school and alumni base of any veterinary school
- **Vet Prep Program**, in a similar fashion to MERP, captures additional student demand and increases likelihood of DVM success post-completion
- **Brand recognition growth** and inclusion in VMCAS is resulting in increasing application volumes, especially for September enrollment
- PhD and MSc programs are expanding

**5,000+**  
ALUMNI

**10%**  
OF BANFIELD  
DVMS ARE RUSVM  
GRADUATES

**66%**  
APPLICANTS  
VIA VMCAS

# Medical & Healthcare Summary



Educate

Continue strategic program development in the core, including new campus development and unmet areas of demand

- Pipeline of online graduate programs in development
- Evaluating additional joint degree programs with other institutions in M/H vertical
- Ability to expand within the college of health professions



Recruit & Select

Select entry options that:

- Leverage alumni and provide growth opportunities relevant to core institutions
- Exercise discipline in execution through strong feedback loop with employee partners



Train & Develop

Leverage institutional content and accreditation for new offerings

Partner to leverage existing relationships for joint sales and provision of alumni upskilling needs