



EAB

Imperatives for the Post-Vaccine Institution

Strategic Advisory Services for Regionals

Access to a Wealth of Higher Ed Insights

Access

Supporting Campus Leaders with Research, Peer Networking, and Leadership Development

Access to research, insights, and actionable advice across the breadth and depth of EAB's expert terrains.

EAB Research Terrains

*Best practice research and insights in **three key terrains***

Academic Affairs and Student Experience

- Academic affairs
- Student affairs
- Research administration

Enrollment Growth and Advancement

- Enrollment management and marketing
- Professional, graduate and online education
- Advancement

College Business, Finance and Administration

- Business affairs, cost and operations
- Information technology
- Facilities and maintenance

EAB Research's Transformation Agenda

Cross-terrain research projects for setting long-range strategy in an era of transformational change



Blueprint for Growth

Future Enrollment Trends
Amidst a Shifting
Landscape



Diversity, Equity, Inclusion, and Justice

Systemic Responses to
Address Systemic
Inequities



Future of Work and Learning

Navigating Shifts in
Student and Industry
Needs and Preferences



Business Model Transformation

Strengthening Financial
Outlook and Investing in
the Future

Five Imperatives for the Post-Vaccine Institution



1

Enrollment

Competition, Not
Demographics,
Is Destiny for
Most

2

Costs

Only the Most
Difficult Trade-
Offs Remain to
Further Reduce
Cost and
Maximize
Efficiency

3

Student Experience

Online Backlash
Has Been
Overstated,
Virtual
Experience Cost
of Doing
Business

4

Mental Health

Preventive
Support, Not
More Counselors
Not the Way Out
of Mental Health
Crisis

5

DEIJ

Only Systemic
Institutional
Change Will Be
Enough to
Address
Systemic Racism

1

Competition, Not Demographics, Is Destiny for Most



Before Covid: Bracing for the Demographic Cliff

Demographics and Demand Drove Strategy

Focused on Maximizing Undergrad Enrollment

Consistent Enrollment Growth in the Grad Market



Now: Preparing to Compete Harder for Changing Student Audiences

Demographic Cliff Not Quite So Steep, But Still Widespread

Market Share Decisive Factor for Most Growth, not Demographics

Long-Term Growth Strategy Expands Beyond Undergrads

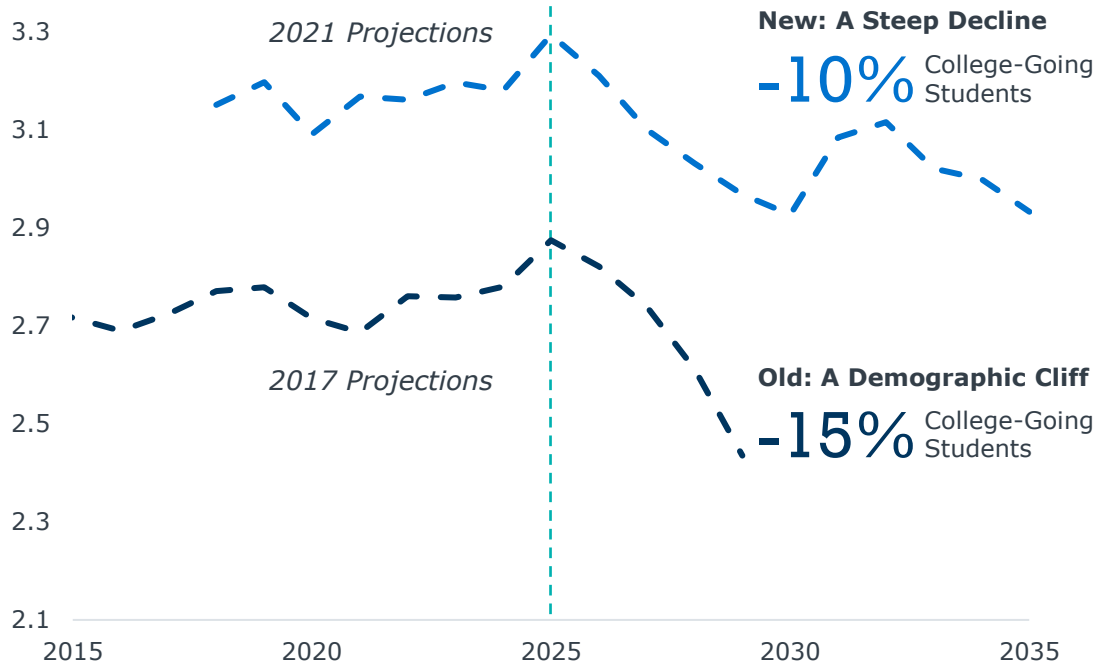
An Only Slightly Less Pessimistic Projection

Years of Enrollment Stagnation...

Millions of College-Going Students

Followed by Dramatic Decline

2025 Onwards

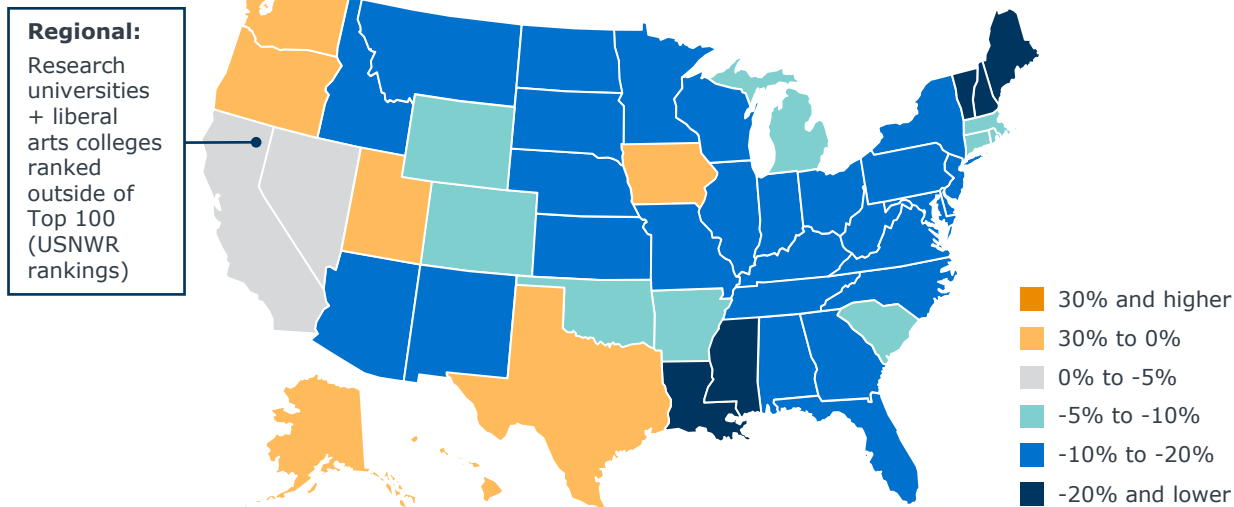


Regional 4-Year Institutions Must Brace for Impact

6

Slim Glimmer of Hope Across Nation For Regional Institutions

Projected Change in 4-Year Regional HEI-Going Students State by State, 2025-2035



If Appropriations Fall, National HEIs Could Poach Students from Regional HEIs

-190k Lower 2035 Projected Demand
than 2025 Projected Demand

If state appropriations fall for public national HEIs, these universities may recruit more students away from regional institutions to bolster tuition revenues.

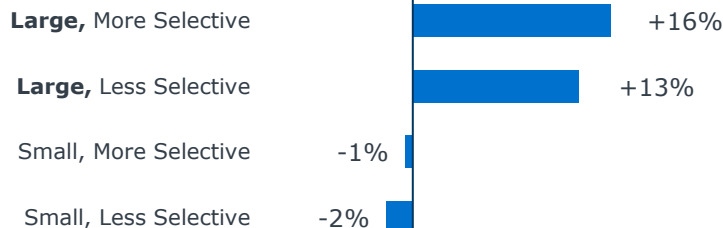
Sources: Grawe, Nathan D., *The Agile College: How Institutions Successfully Navigate Demographic Changes*, 2021; EAB analysis.

Application Flight to Size and Selectivity

Pct. Change in Common App Submissions 2019-20 to 2020-21

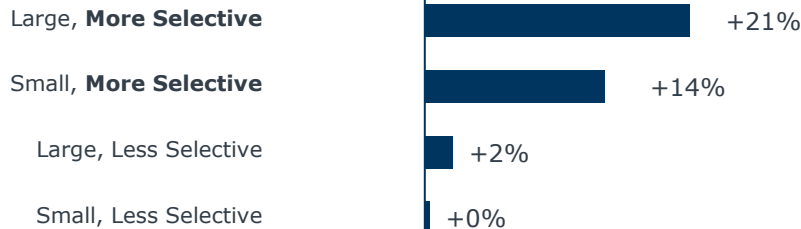
Public Institutions

Applicants Seek Public Universities That are Larger



Private Institutions

But Private Institutions that are More Selective



Apps Outpace Students, Raising Yield Concerns

+11% Total Applications

+2% Unique Prospects

And FAFSA Filings Present Worrying Signs for Equity

% Change in FAFSA Completion

-12% At Title I Eligible High Schools

-14% At High POC High Schools

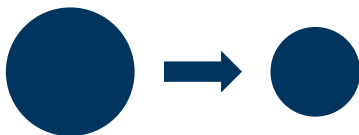
1) Large: More than 10,000 total students
2) More Selective: admit rate of less than 50%

Importance of Demographics Overstated



Market Share a Powerful Determinant of Undergrad Enrollment Growth

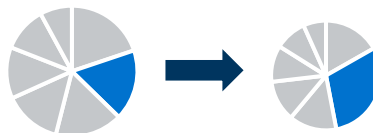
What Demographic Change Looks Like The total number of students enrolling in college.



Key Drivers:

- Population Change
- High School Graduation Rates
- College-Going Behaviors

What Market Share Change Looks Like An institution's share of total students



Key Drivers:

- Other Competitors
- Programs, Experience, Affordability, ROI
- Sophistication of Marketing and Recruitment

Market Share has Almost Twice the Impact¹ on Enrollments vs. Demographics

Private Regional Institutions

36% Of enrollment change caused by demographic shifts
*Institutional average²
(2008 to 2018)*

64% Of enrollment change caused by changes in market share
*Institutional average²
(2008 to 2018)*

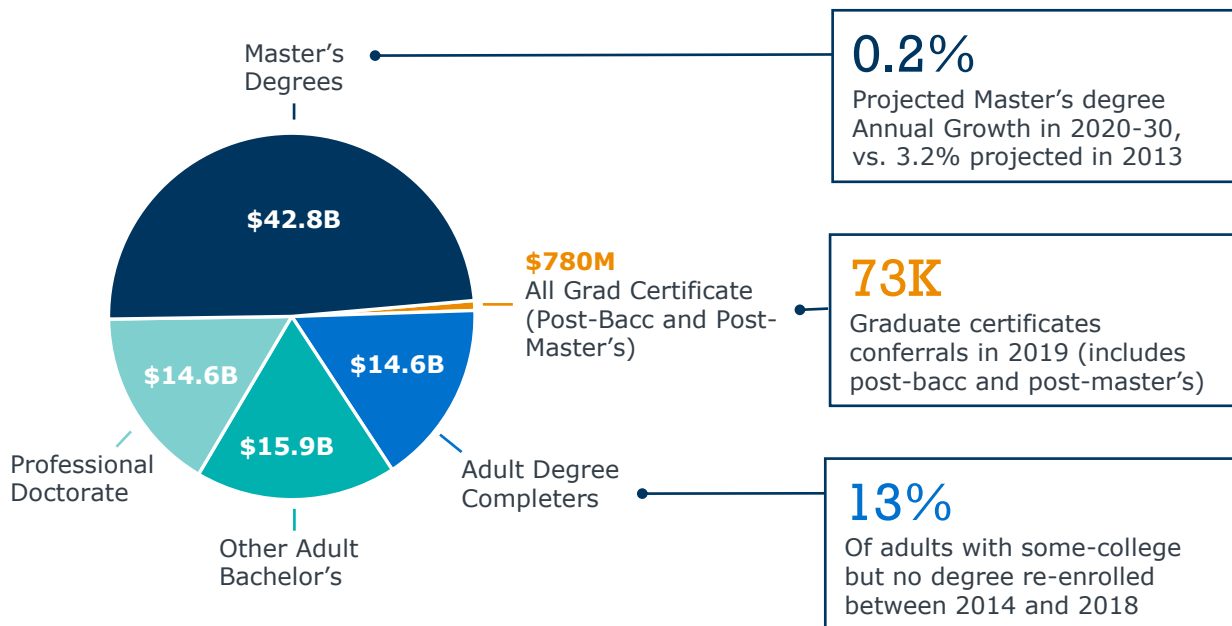
1) Impact calculated as a share of the absolute year-on-year change

2) Weighted average of four-year public and private, non-profit institutions.

Sizing the Adult and Grad Ed Revenue Opportunity

Large Markets, But Growth Potential Often More Challenging than Assumed

Gross Annual Tuition Revenue Generated from Adult (25+) Bachelor's, Post-Bacc. Certificates, and Graduate Enrollment, 18-19



2

Only the Most
Difficult Trade-
Offs Remain to
Further Reduce
Cost, Maximize
Efficiency



Before Covid: An Evergreen Effort to Find Savings and Efficiencies

Process Improvement
Initiatives Across Campus

Shared Services and Space
Consolidation

Maximizing Section Fill Rates
and Instructional Capacity



Now: New Table Stakes Go Beyond Cuts, Require Major Reorganization

Adopt Continuous Program
Review Processes

Consolidate Academic
Departments and Schools

Commit to Remote and Hybrid
Work for the Long-Term

Finding Savings Beyond Cuts



Only Difficult Decisions and Trade-Offs Remain in the Covid Era

Evergreen Focus Areas



- Continuous process improvement
- Shared services
- Maximize space utilization
- Maximize faculty instructional capacity
- Outsourcing

New Table Stakes Require Major Reorganization



- **Decrease portfolio complexity through annual program reviews**
- **Identify opportunities to merge academic departments and schools**
- **Extend remote and hybrid work options beyond Covid Era**

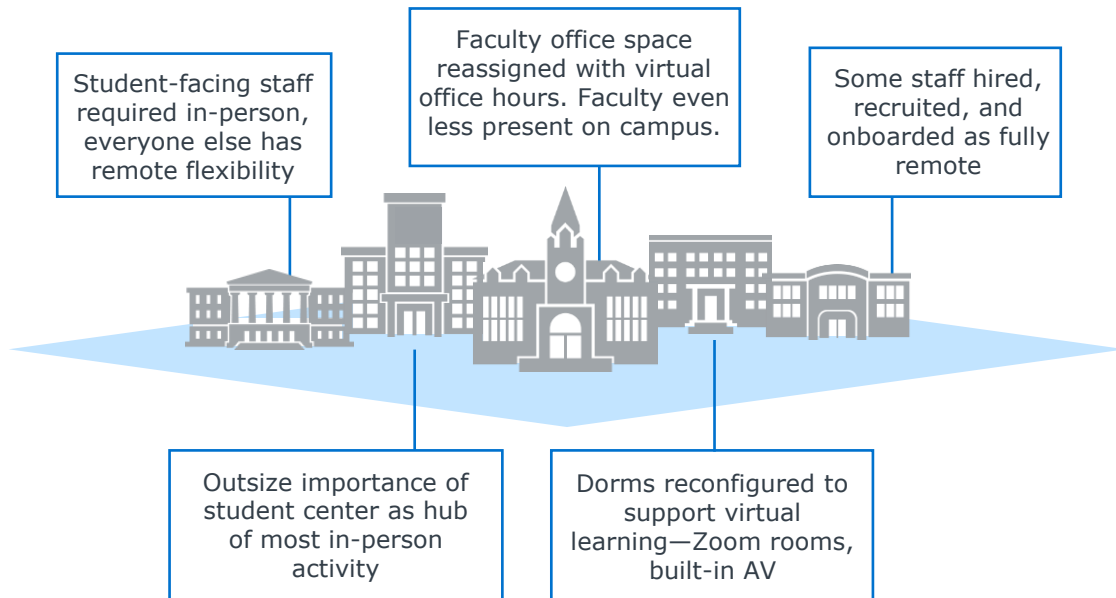
Bolder Moves Beyond Cost and Efficiency



- Proactively downsize physical campus
- Evaluate P&T sustainability
- Explore mergers and acquisitions

The Hybrid Campus of the Future

Inadvertently Creating a Culture of Haves and Have-Nots?



How Much Farther Can We Go?



Pandemic Creates the Occasion to Discuss More Radical Moves

Previously Off-Limits Discussions

Can we proactively downsize campus?

And can we responsibly maintain or grow what we have in a more-hybrid future?

What are the alternatives to P&T?

How much latitude do we have to re-envision faculty roles and ladders?

Are we in the market for M&A?

If so, would we be a buyer or a seller?

Forthcoming Research Agenda: Business Model Transformation



Hybrid Campus of the Future

- Aligning physical space with strategic priorities
- Anticipating long-term expectations for remote work, hybrid learning
- Prioritizing new investments, strategic “rightsizing”



21st Century Labor Models

- Future of the faculty role and governance
- New models for entry-level instruction and student service
- Long-term impact of automation

3

Online Backlash Has Been Overstated, Virtual Experience Now Cost of Doing Business



Before Covid: Customer Experience Secondary to Academics

Most Student Services In-
Person, Difficult to Navigate

“One-Stop Shops” the Paragon
of Customer Service

Undergraduate Online Learning
Misunderstood as Less Rigorous



Now: Heightened Expectations of Both In-Person and Virtual Service

Current Consumer Behaviors
Will Outlast Pandemic

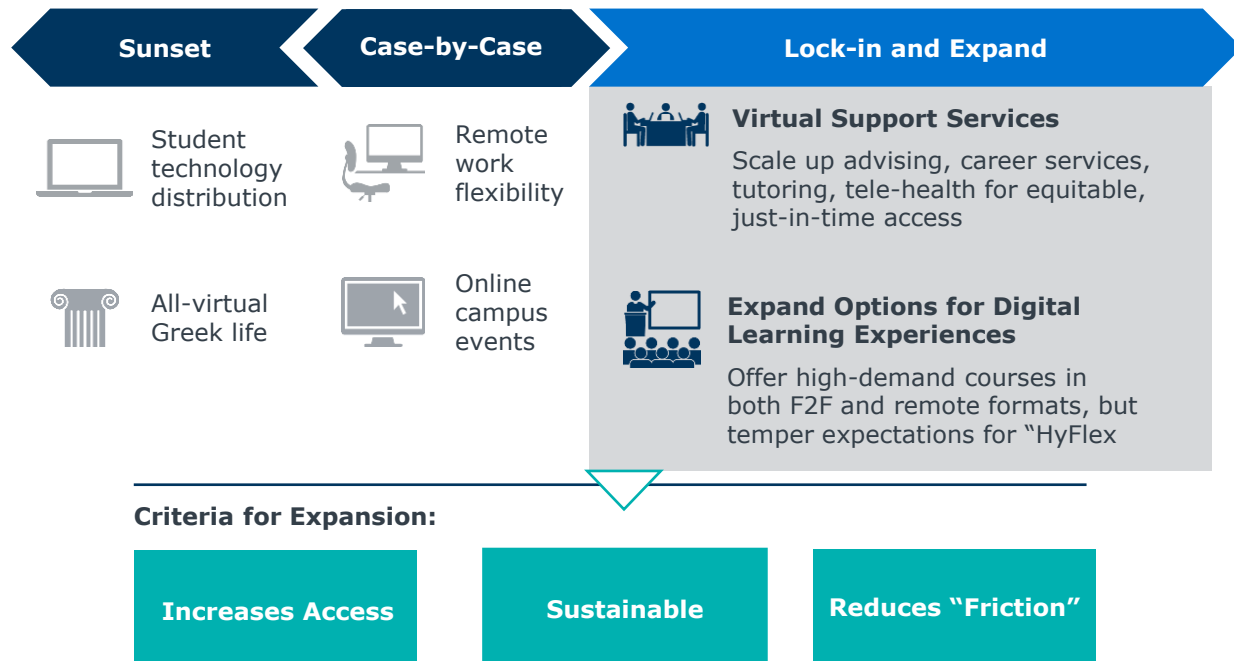
Prepare for Long-Term Virtual
Services Investments

Prioritize Just-in-Time, Equitable
Access

Post-Pandemic, Focus on Known Wins

15

Strategically Scale or Sunset Virtual Services Based on Student Needs



Toward a More Hybrid Future

How Do We Preserve and Scale the Best Parts of Virtual Learning?

THE NEW YORKER

Jeanie Suk Gerson,
"Finding Real Life in
Teaching Law Online"
April 2020

- Socratic method better on Zoom
- Easier to see facial expressions
- No one sitting in the back
- Students less self-conscious and less intimidated

"Online teaching makes the attention to each student feel more live and personalized, not less."

Five Opportunities



Ending the
Lecture As
We Know It



Replace
Office Hours
with Virtual
Outreach



Intentional,
Online Peer-
to-Peer
Networks



Problem-
Based Group
Work at the
Core



Integrated
Data on
Student
Progress

4

Preventive Support, Not More Counselors the Way Out of Campus Mental Health Crisis



Before Covid: Mental Health Requires More Budget, Senior Time

Rising Levels of Anxiety and
Depression Already a Crisis

Increase in Counseling Center
Use Far Outpaces Enrollment

Institutions Start Trying Scaled
and Non-Clinical Resources



Now: Mental Health a Barrier to Institutional Strategic Success

Rising Levels of Isolation and Grief,
Greater Expectations of Support

Both Clinical and Non-Clinical
Solutions Essential

Integrated Wellness Environments
for Students, Faculty, and Staff

“Well-Being” vs. Mental Health

Mental Health Often Included in ‘Health’ Among Other Key Factors to Thriving

“Well-being is used frequently as a synonym for ideas “mental health,”. Theorizing well-being in a way that feels both relevant and measurable begins with looking at **what people need to thrive in their lives.**”

—Chief Wellness Officer, 4-year
Public U.S. University

The ‘Well-Being’ Umbrella

Mental Health

Sense of Community

Life Purpose

Career

Physical Health

Spiritual Wellness

Financial Security

Social Fulfillment

Collegiate Well-Being Initiatives Often Focus on Overall ‘Health’:



Vision: Campus communities in which all members live long, **healthy** lives

OKANAGAN CHARTER
AN INTERNATIONAL CHARTER
FOR HEALTH PROMOTING
UNIVERSITIES & COLLEGES

Vision: Embed **health** into all aspects of campus culture

How to Get There

Imperatives for Leadership



Set an Institutional Definition and Vision for Well-Being



Structurally Embed Well-Being across the Institution



Scaling Personalized Support for Students and Faculty



Connect Well-Being to Other Key Institutional Goals

5

Only Systemic Institutional Change Will Be Enough to Address Systemic Racism



Before Covid: Low Urgency to Address Systemic Racism on Campus

Major Retention, Completion, and Job Placement Gaps Persist

Faculty and Staff Diversity Lags Behind Student Diversity

Students of Color Experience Hostile Campus Climate



Now: Pandemic Accelerates Social and Economic Gaps

Disproportionate Health, Financial Impact on Students of Color

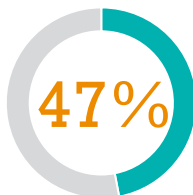
Diverse Junior Instructors and Staff More Likely to Be Laid Off

Anti-Racism Statements Promise Change, But Little Commitment

Insufficient Understanding of Systemic Racism

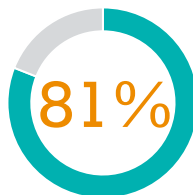


"Systemic Racism" Enters the Conversation



Of statements included references to **structural or systemic racism**

...But Few Connect Antiracism to Institutional History or Structures



Of statements **do not acknowledge historical complicity** in racial oppression

Hyper-Focus on Individual Actions Overshadows Long-Term Structural Changes



Individual



Structural, Systemic



Hire a Chief Diversity Officer

Book clubs, self-reflection

Anti-bias trainings

Develop DEIJ or antiracism plan

Rename buildings, celebrate Juneteenth

Recruit racially diverse faculty

Racial representation on board and leadership

Acknowledge historical ties to racial oppression

P&T metrics acknowledge racial justice goals

Unclear Strategy and Priorities

Institutional Efforts Center on Incremental, Low-Resource Commitments

Commitments in Our Comfort Zone

Percentage of Statements with Action Items that Include Commitment to:

Conduct Listening Tour/
Climate Assessment



42%

Celebrate Juneteenth



40%

Develop Antiracism
Trainings



37%

Form a Committee
or Taskforce



31%

Expand Services/
Supports for BIPOC



25%



**No Connection to
Long-Term Strategy**

75%

Of statements with action items did not **connect them** to institutional strategic plans

**Actions Without Dollars
Undermine Sustainability**

37%

Of statements with action items **allocated funding** to them

From Statements to Substantive Action



EAB's DEIJ Plan Design Lab



"Is my DEIJ plan aligned with industry best practice?"

DEIJ Institutional Plan Assessment

Assess your existing DEI plan or in-progress draft, and enact specific, research-driven advice.



"What are the most important metrics for us to track over time?"

DEIJ Institutional Metrics Selection Workshop

Engage with EAB experts in facilitated workshops to identify the most important metrics to track progress on your campus.



"What role does my unit play in operationalizing our DEIJ plan?"

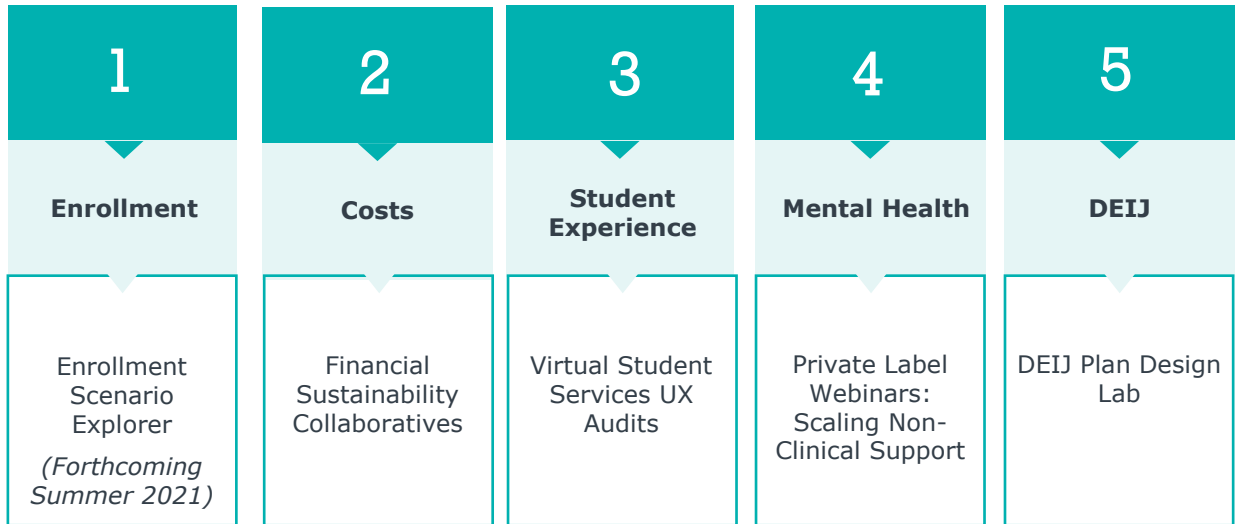
DEIJ Divisional Alignment Exercise

Unpack the process for cascading institutional goals and metrics to divisions and departments.

Five Imperatives for the Post-Vaccine Institution

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New Services from EAB Research



Coming Soon: Institutional Strategy Workshop for Cabinets and Boards



How prepared is our institution to meet the moment on each imperative?



What trade-offs and investments do we need to make now to thrive in the long-term?