

INSIGHT PAPER

Mapping the Enrollment Landscape

Five Near-Term Strategic Priorities for Admissions Teams



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Enroll360

Project Director

Tom Cakuls

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Preamble: What's Keeping Your Peers up at Night?

Findings from EAB's December 2022 Topic Poll

The incredible convergence of crises our nation has faced since the start of the pandemic has amounted to a kind of stress test for higher education, revealing strengths and vulnerabilities that previously went unnoticed, were underestimated, or were misunderstood. It has, consequently, helped clarify which challenges are most likely to define enrollment success or failure in the near future. One of the many ways in which EAB identifies related trends is via a regular poll we do of enrollment leaders asking which topics are of greatest interest to them. Because their responses mirror their context, these responses also give us a glimpse into how various challenges are trending across enrollment markets nationally.

Percentage of Surveyed Enrollment Leaders Including Topic Within Their Top Five

By Institution Segment

	Large public or private	Regional private	Regional public	Selective
Mapping the Enrollment Landscape of the Near Future <i>Five Coming Changes that Admissions Leaders Should Start Planning for Today</i>	59%	60%	60%	33%
Innovations in Pricing Strategy <i>How To Frame Your Cost of Attendance for an Increasingly Value-Focused Prospect Pool</i>	52%	58%	40%	42%
Differentiating Your Student Value Proposition <i>A Comprehensive Framework for Assessing Your Institution's Brand in Market Context</i>	38%	48%	80%	17%
Recruiting "Gen P" <i>How the Pandemic Has Permanently Altered Students' College Search Behaviors and Academic Preparedness</i>	38%	45%	20%	50%
A National Survey of Recruitment-Marketing Practice <i>Where Are High-Performing Enrollment Teams Focusing Their Most Intensive Efforts, and Why?</i>	45%	25%	20%	42%
Real-World Enrollment Analytics <i>How to Equip Your Team with Essential Report Libraries and Critical Ad Hoc Reporting Capabilities</i>	35%	23%	50%	42%
Maximizing Enrollment-Office Efficiency <i>How to Maintain High Service Standards in the Face of Historic Staffing Shortages</i>	17%	43%	20%	42%
Next-Generation List-Source Management <i>How Are Changes in Test-Taking and Name-Source Pricing Models Impacting Recruitment Strategy?</i>	24%	30%	40%	42%

Source: EAB 2022 Enroll360 Topic Poll.

Shown on this and the facing page are findings from our most recent poll. The topics addressed in this report correspond to issues that our poll revealed to be of most urgent and widespread concern to enrollment leaders, including what decreasing demand for higher education means for admissions teams, changing public attitudes about the value of higher education, how today’s high schoolers differ from recent generations of college-goers, strategies colleges are adopting to compete more effectively over a shrinking pool of students, and how admissions offices are restructuring to adapt to these trends.

	Large public or private	Regional private	Regional public	Selective
A “Nonconsumption” Risk Assessment and Planning Guide <i>Why More Students Are Opting Out of College and What You Can Do About It</i>	28%	38%	30%	0%
Cross-Segment Competition <i>How Market Share Is Shifting Between College Types and What This Means for Your Recruitment Strategy</i>	38%	25%	0%	17%
Maximizing CRM Utility <i>How to Realize the Latent Potential of Your Data-Capture and Communications Systems</i>	17%	23%	40%	17%
The State of the FAFSA <i>How High-Performing Teams Are Navigating an Uncertain and Rapidly Changing Financial Aid Landscape</i>	24%	25%	20%	8%
A Guide to the Emerging Reverse-Admission Landscape <i>How the Ability to Offer Proactive Admissions Offers at Scale Is Transforming College Search</i>	17%	23%	20%	8%
Race-Conscious Admissions in an Uncertain Legal Landscape <i>How Should Enrollment Leaders Be Preparing for Fallout from Recent and Future Supreme Court Rulings?</i>	24%	5%	0%	67%
International Advantage <i>How to Keep Your Overseas Recruitment Efforts Aligned with Rapidly Evolving Patterns of Demand</i>	21%	8%	20%	33%

Source: EAB 2022 Enroll360 Topic Poll.



Priority 1

Understanding decreasing demand for higher education

SECTION

1

A Tentative Recovery

Cause for celebration

The 2022 admissions cycle brought welcome news to the nation’s enrollment leaders in the form of a second consecutive year of enrollment growth after a sharp pandemic-driven drop in 2020.

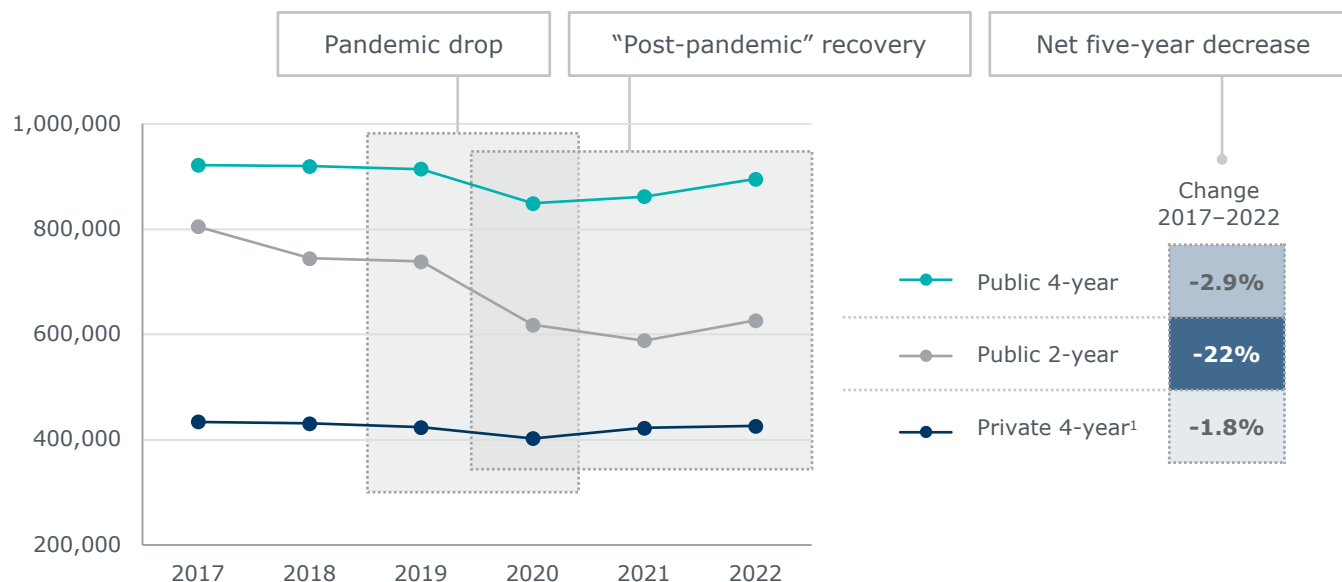
Persistent concerns

That said, few admissions teams are resting easy. The rebound in enrollment referenced above comes in the context of a longer-term nationwide decline: from 2017 to 2022, four-year public institutions saw a 2.9% decrease in freshman enrollment, and their private counterparts saw that figure drop by 1.8%. Furthermore, it is possible that the recent uptick is a temporary deviation from this pattern of decline, corresponding to pent-up demand from 2020.

Also troubling is the much larger and more persistent enrollment shortfall seen at two-year institutions. While this may not be of immediate concern to admissions teams at four-year schools (aside from knock-on decreases in transfer enrollment), some wonder whether this trend might be foreshadowing similar problems for their institutions.

Freshman Enrollment by School Segment, United States

By Entering-Class Year, Students Aged 24 Years or Younger



A note on the data

Preliminary numbers released by National Student Clearinghouse in the fall of 2022 painted a much more dire picture, showing enrollment decreases of 9% to 16% for four-year publics and 6% to 13% for privates (varying by selectivity in both groups) for the time period from 2019 to 2022.

1) Private-institution data shown excludes for-profits.

Source: EAB analysis of National Student Clearinghouse data.

Many More High School Grads Are Opting Out of Higher Ed

A drop too big to ignore

As noted on the preceding page, the nation’s two-year colleges have seen striking enrollment declines in the past five years. Given the size of the drop and the lessons it might hold for four-year institutions, the point merits additional explanation.

Students saying “no” to college









While recent enrollment declines at community colleges might, in theory, be due to any number of factors—demographic change, for example—the primary cause seems to be a reduced rate of college-going among high-school graduates, a phenomenon sometimes referred to as “nonconsumption.”

As illustrated at right, with data from a selection of states and for the nation as a whole, growing numbers of high school graduates are opting out of higher education.

While the impact of this phenomenon has, to date, been most pronounced on two-year campuses, enrollment leaders at four-year institutions are taking note.

Change in College-Going Rate for Recent High School Graduates

Proportional Change, Various Time Frames, Selected States, Based on Any Postsecondary Enrollment

 Arizona (2017 vs. 2020) -16%	 Michigan (2016 vs. 2021) -17%
 Alabama (2014 vs. 2020) -17%	 Tennessee (2017 vs. 2021) -17%
 Idaho (2017 vs. 2020) -22%	 West Virginia (2010 vs. 2021) -17%
 Indiana (2015 vs. 2020) -21%	 United States (2017 vs. 2020) -10%

“With the exception of wartime, the United States has never been through a period of declining educational attainment like this.”

”

Michael Hicks
Director, Center for Business and Economic Research
Ball State University Miller College of Business

Source: “How Higher Education Lost Its Shine,” The Hechinger Report.

Why Are Fewer Students Choosing College?

Multiple Factors Underlying “Nonconsumption”

While recent enrollment declines at four-year institutions are nowhere near as large as those experienced by community colleges, forward-thinking enrollment leaders at the former are studying the experience of the latter to see what lessons might be learned. One key question in this context is that of what, specifically, is causing fewer students to choose college. Shown on this and the facing page are several likely contributing factors.



Unaffordability

While we often think of “affordability” as being a relative term, the number of students who literally cannot afford to go to college—those for whom doing so would cause unmanageable financial hardship in the short or long term—appears to be on the increase.



Perception of Poor ROI

Besides students who literally cannot afford college, there is an increasingly large additional group who don’t believe it is worth the cost—60% of students surveyed are of this opinion¹. Unhelpfully, evidence proving that they are, in some cases, correct, continues to mount.



A Hot Job Market

The second largest group of nonconsumers, after those citing cost as the main reason for their decision, are those who opt to work instead of going to college.² While they often do so out of need (they cannot afford not to work), high wages due to labor shortages have lately pulled more students directly into the workforce.



Rise of Nondegree Credentials

New market entrants offering inexpensive and quickly attainable credentials, and employers’ increasing recognition of them, are convincing some students that college is not the best route to lucrative employment. Interest in traditional college alternatives, such as apprenticeships, has also grown tremendously.

1) 2023 WSJ/NORC survey.

2) Gates-Foundation-funded study by HCM Strategists and Edge Research.

Source: EAB research and analysis.

Some of the factors underlying nonconsumption are almost certainly financial—it appears that the cost of college may have finally reached a level where students are deciding it’s just not worth it, particularly as doubts about the return on investment of a degree have grown more widespread. Additional factors are likely amplifying the impact of students’ growing price sensitivity—for example, the rise of nondegree credentials, such as coding certificates, which some students see as a cheap and fast alternate path to high earnings.



A Cultural Turn Against Higher Ed

Multiple cultural factors—including high-profile press coverage of higher-education controversies, increasingly prevalent anti-elitist populism, a conservative backlash against “woke-ism” on college campuses, and get-rich-quick influencer culture—have led more students and families to question the value of higher education.



Degree Resets

The buyer’s market for labor that emerged after the 2008 recession allowed employers to require degrees for roles for that didn’t previously need one. Current market forces appear to be undoing that trend, with many employers removing such requirements—a phenomenon known as a “degree reset.” (See page 14.)



Pandemic Effects

Besides directly harming the health of many students and their families, COVID created other conditions that negatively impacted students’ eagerness or ability to attend college, including learning loss and under-socialization, family financial hardship, and reduced contact with high school counselors.



Generational Change

There is growing evidence that psychological and developmental characteristics of current high schoolers that first became apparent during the pandemic—including ones that constitute impediments to college-going—actually predate the pandemic and may be expected to outlast it (see page 26).

Degree Resets Are Undermining a Key Driver of Demand

A deeper dive

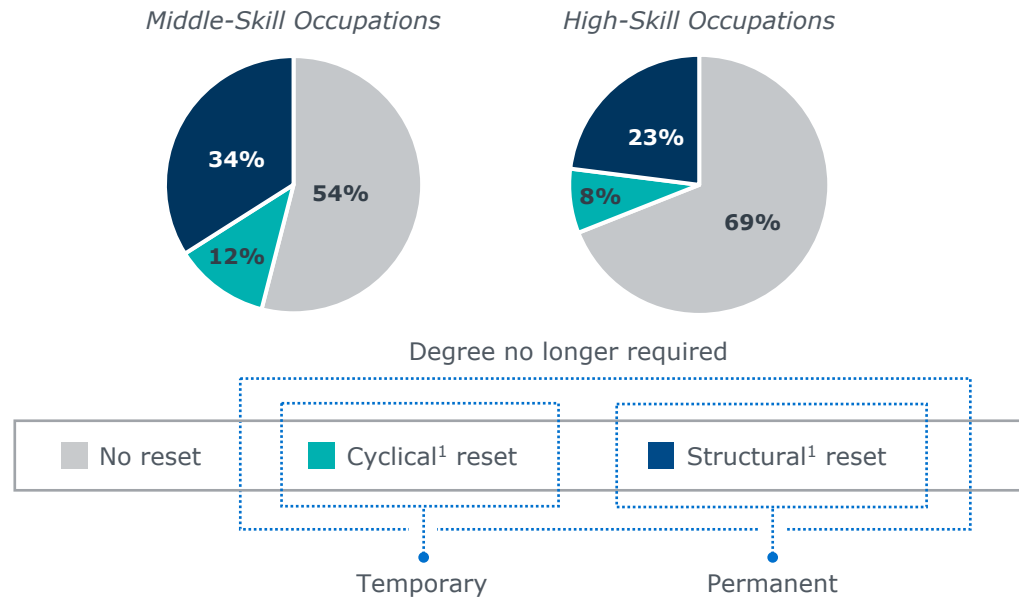
While this report does not explore all of the factors contributing to nonconsumption, as outlined on the preceding two pages, it does go deeper on two factors that may be less familiar to our readers, starting, on this page, with degree resets.

Back to the future

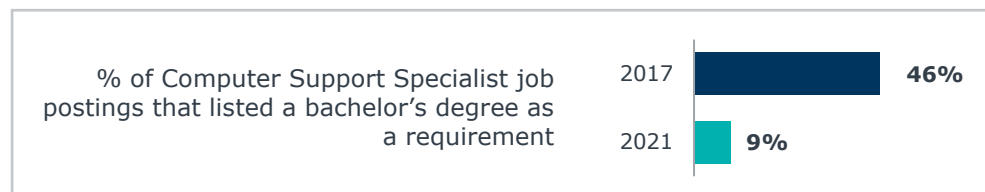
“Degree resets” refers to the phenomenon of employers reducing the number of jobs for which a college degree is considered an essential qualification.

By way of historical context, the last decade saw widespread “degree inflation,” whereby employers started adding college degrees as a minimum requirement for jobs that had not materially changed—something they were able to do because of the buyer’s market for labor that emerged after the 2008 recession. Due in part to the tight labor market of the present, employers are undoing this trend via degree resets.

Percentage of Occupations Undergoing Degree Resets



Some companies that have pivoted from degree-based hiring to skills-based hiring



1) The study's authors deem resets "cyclical" if employers return to requiring a degree for roles that previously had that requirement waived. This can result from temporary changes in market context—for example, demand for health care workers surging during the worst parts of the COVID pandemic and lessening thereafter. Resets are deemed "structural" mostly on the basis of their observed persistence over an extended period of time without evidence of reversal.

Source: "The Emerging Degree Reset," The Burning Glass Institute.

Alternate Providers of Credentials a Growing Threat to Higher Ed

Opting out, opting in

While nonconsumption is often thought of in the negative—merely as students opting out—it is more helpful to think of it as students opting *in* to non-college options that they believe offer a more affordable, effective, or otherwise superior route to achieving their life aims.

New life for traditional training

Much of the discussion around these college alternatives tends to focus, understandably, on providers of educational and training credentials related to high-growth, high-tech industries.

But recent years have also seen much greater student participation in more traditional forms of structured, non-college career training, such as apprenticeships. As shown at right, the number of new apprentices in the United States grew by 129% between 2010 and 2019—more than 10 times the rate of growth for new undergraduate enrollment at four-year colleges and universities across the same time. (If two-year institutions are included, total undergraduate enrollment dropped by seven percent across the same time period.)

New Non-College Fast Tracks to Attractive Careers

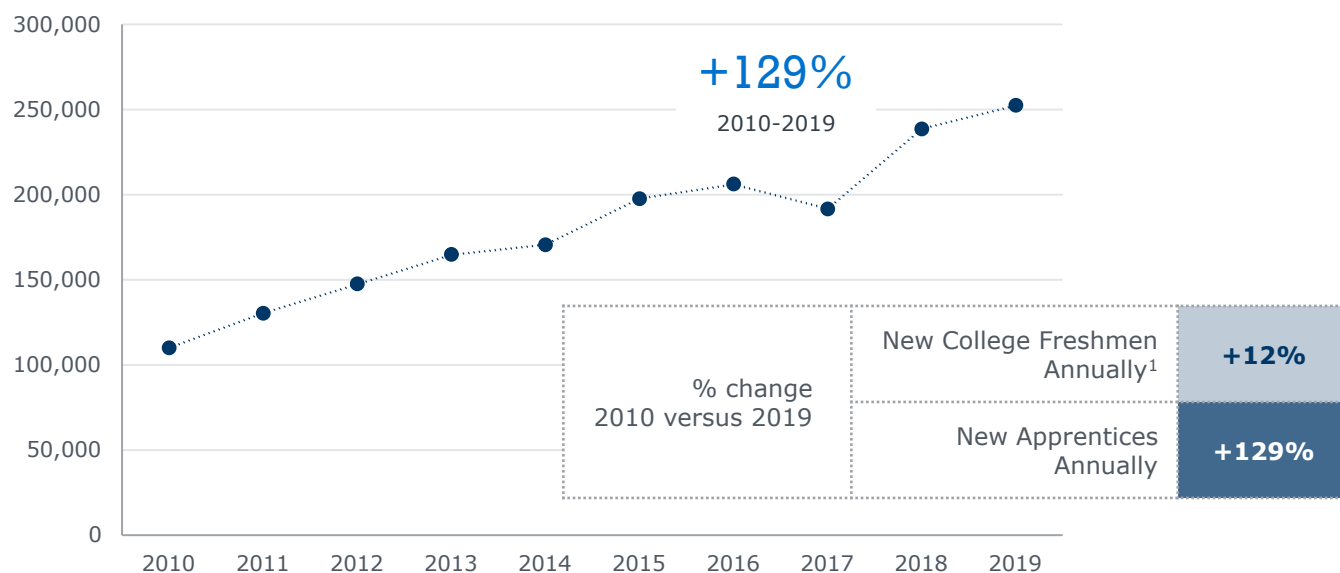
A Case in Point



\$100 million partnership helps participants earn IT certificates and counsels them toward employment

New Competition from Traditional Forms of Career Training

New Apprentices Annually, United States—Department of Labor Statistics Data



1) Four-year public and private not-for-profit institutions, United States.

Source: "The Emerging Degree Reset," The Burning Glass Institute; National Center for Educational Statistics; "FY 2021 Data and Statistics: Registered Apprenticeship National Results Fiscal Year 2021," U.S. Department of Labor; EAB analysis of IPEDS data.



Priority 2

Navigating a hostile cultural context

SECTION

2

Growing Negative Sentiment Regarding Higher Education

An image problem

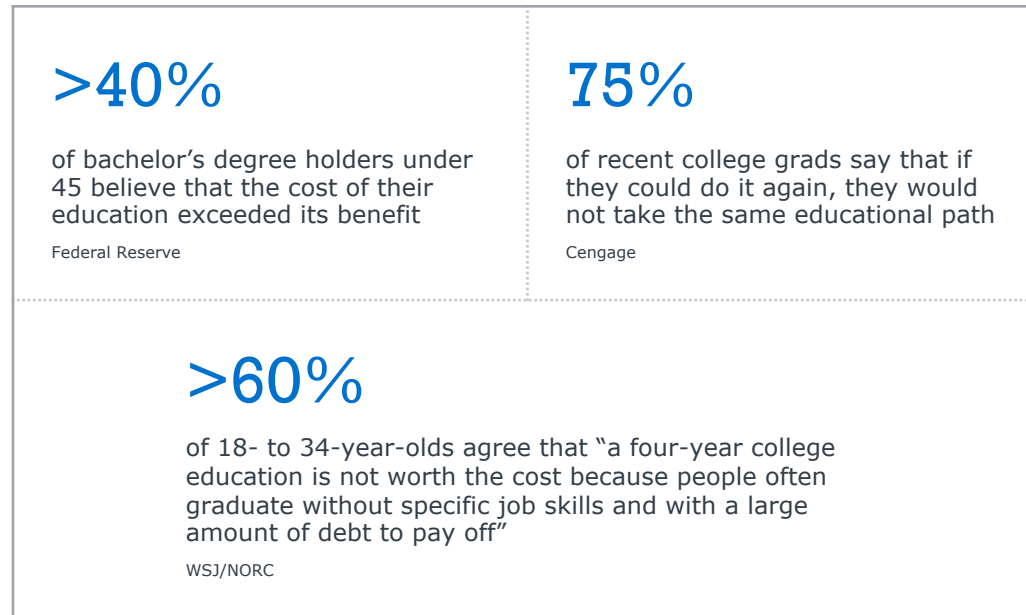
As noted briefly in the preceding section, some of the recent decline in demand for college is likely related to increasingly widespread negative perceptions of higher education among the general public. This section takes a closer look at that phenomenon.

A quickly-evolving landscape

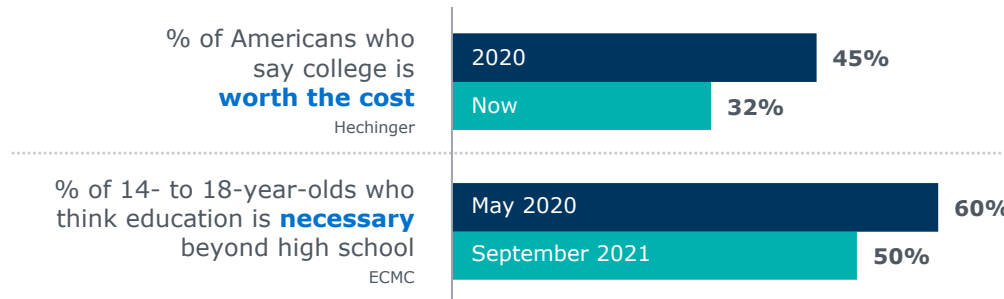
Anyone working in the field for any length of time will have seen plenty of reports over the years of public skepticism regarding higher education. But the current moment seems different, not least of all because the prevalence of negative opinion is rapidly growing.

Also new is the strong ideological slant to college skepticism. Negative views of higher education are far more prevalent and categorical among politically conservative groups—for example, 64% of Republicans say colleges “have a negative effect on the way things are going in the country today” (versus 22% of Democrats).

Reports Too Dire and Too Numerous to Ignore



Rapid Deterioration



Source: “How Higher Education Lost Its Shine,” The Hechinger Report; “Question the Quo,” ECMC Group; 2023 Wall Street Journal/NORC poll; “Republicans increasingly critical of several major U.S. institutions, including big corporations and banks,” Pew Research Center; “Economic Well-Being of U.S. Households in 2021,” Board of Governors of the Federal Reserve System; “Regret, Confusion and Lack of Confidence: Cengage Group’s 2022 Graduate Employability Report Exposes the Reality of Entering Today’s Workforce,” Cengage Group.

A Narrowly Vocational Vision

A focus on employability

As noted on the preceding page, negative sentiment regarding higher education is becoming increasingly widespread. But the perspectives of college proponents have also evolved in problematic ways. One example is their increasingly narrow conception of college as career prep.

Problems for colleges

Various factors, including the high cost of college, have led students to focus on fields of study they believe are most likely to boost their employability and earnings. One clear sign of this is a large and rapid decrease in humanities enrollment.

While this is not necessarily having a direct negative impact on overall enrollment, it does pose several problems for colleges and universities. One is that it leaves expensive legacy infrastructure (i.e., humanities departments) underutilized. It also reinforces the same logic of unbundling that is behind some students' choice to forgo college in favor of cheaper forms of job training and skills certification.

Students See the Humanities as a Luxury They Can't Afford



“My issue as a first-gen student is I always view humanities as a passion project. You have to be affluent in order to be able to take that on and state, ‘Oh, I can pursue this, because I have the money to do whatever I want.’ I view the humanities as very hobby-based.”



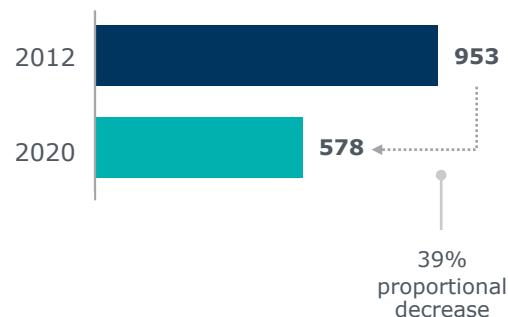
Anonymous Harvard student
quoted in *The New Yorker* magazine

Change in Number of Humanities Graduates, 2012-2020

Ohio State (main campus)	-46%	Notre Dame	-50%
Tufts	-50%	SUNY Albany	-75%
Boston University	-42%	Vassar College	-50%

Richly Resourced Academic Programs with Few Takers

Number of English Majors on Campus, Arizona State University



ASU's English faculty includes 71 tenure-track professors, two of whom won Pulitzer prizes in 2021—more than any other English department in America.

Source: Nathan Heller, "The End of the English Major," *The New Yorker*.

Collateral Damage in the Culture Wars

Politics influence school choice

As mentioned earlier in this section, one troubling aspect of the current national climate for higher education is its increasing political polarization.

Beyond influencing Americans' overall views on the value of higher education, this phenomenon is additionally causing students to factor state-level politics into their choice of college—avoiding, for example, states with restrictive abortion laws.

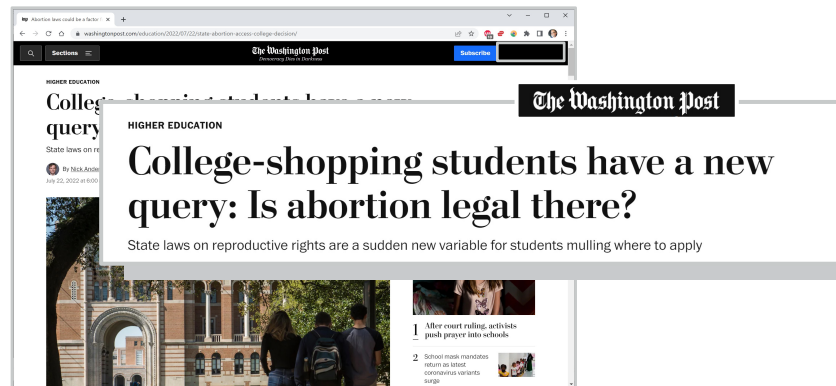
A broad phenomenon

The phenomenon of state politics influencing school selection is not limited to the liberal end of the political spectrum; conservative students are almost as likely as their more left-leaning peers to avoid states they perceive as embodying political values they don't agree with.

Note as well that students' attunement to the political landscape is not merely a question of ideology and values; in many cases it is driven by practical concerns over health (e.g., in the case of access to reproductive-health services) or safety (e.g., in the case of gun laws).

Schools in Affected States Suffer a Selective Disadvantage

Case in Point: Attack on Reproductive Rights Putting off Potential Students



80%

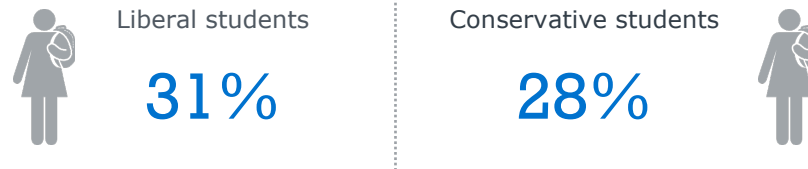
of Democratic college students (and 62% of Republican students) say reproductive health laws are at least somewhat important to their decision to stay at their current school

Lumina Foundation/Gallup

Students Ruling Out Colleges Based on State Politics

Percentage of Surveyed Students

The Hill



Source: "College-shopping students have a new query: Is abortion legal there?", *The Washington Post*; Stephanie Marken, Reproductive Health Laws Factor Into Many College Decisions," Lumina Foundation and Gallup Poll; "One in four college applicants avoids entire states for political reasons," *The Hill*.

Regressive Politics Come to Campus

Ideology impacting colleges

As noted on the preceding page, state-level politics influence students' school selection insofar as college-goers will strive to avoid places where the cultural climate is hostile to their own values. But politics are increasingly manifesting not only in schools' broader contexts but also on college campuses themselves.

A hostile campus climate

One prominent example of this trend is conservative lawmakers' attempts at barring "divisive concepts"—including ones related to racial justice—from higher education curricula and from other dimensions of campus life.

Schools impacted by such lawmaking (most obviously public institutions) may reasonably fear that many students, put off by this hostile climate, will cross them off their lists. Conversely, we've already seen colleges with more open cultures actively courting students from regions impacted by aggressive conservative political interventions.

"Anti-Woke" Legislation Signals a Hostile Climate for Learning

Gag Orders Not Just a K-12 Concern

Young and Friedman



of educational gag orders proposed in 2022 targeted colleges and universities—a 30% proportional increase over 2021

DEI in the Crosshairs

Lieb

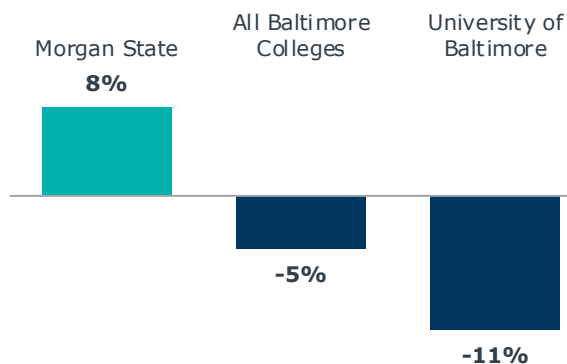


Lawmakers in at least a dozen states have proposed more than 30 bills this year targeting diversity, equity, and inclusion efforts in higher education.

Flight to HBCUs

Douglas-Gabriel

Change in Enrollment, Fall 2022 vs. Fall 2021



"Students are looking for a place where they feel physically and psychologically safe, and a lot of HBCUs, including Morgan, are seeing increased enrollment because of that national context."

Kara Turner
VP for Enrollment Management and Student Success
Morgan State University

Source: David Lieb, "GOP states targeting diversity, equity efforts in higher ed," AP News; Danielle Douglas-Gabriel, "Maryland colleges are trying to shake tepid enrollment. Results are mixed." *The Washington Post*; Jeremy Young and Jonathan Friedman, "America's Censored Classrooms," PEN America.



Priority 3

Serving a new kind of student

SECTION

3

Five Characteristics of ‘Gen P’

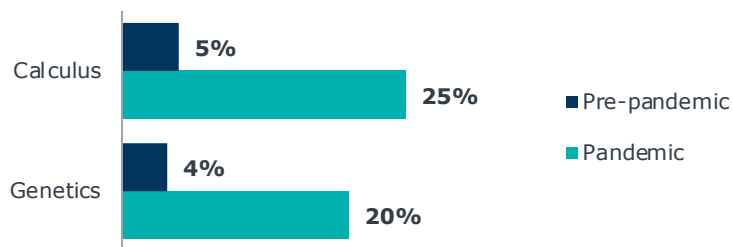
What the Pandemic Taught Us About Today’s (and Tomorrow’s) College-Goers

As was discussed in the last section, it is going to be increasingly important for you to understand how broader cultural factors are manifesting in students’ perceptions of higher education generally and their view of your institution in particular. This section goes deeper on that question, looking specifically at how students of the pandemic era differ from other recent generations of college-goers. We’ll be referring to this current cohort as “Gen P”—that’s P for pandemic. Illustrated on this and the facing page are characteristics of today’s students that the pandemic brought to light. Crucially, some of these characteristics seem likely to outlast COVID.

1 Academically Underprepared

Failure Rate for Selected Freshman Courses, UT Austin

Sanchez



2 Less Persistent

“Two percent of our 2022 entering class **dropped out** within ten days of arriving on campus. That’s five times the rate we’ve seen historically.”

Vice President, Enrollment Management
A small private college in the Midwest
EAB

“My kids have a shorter fuse. When things start getting complicated, **they’re done.**”

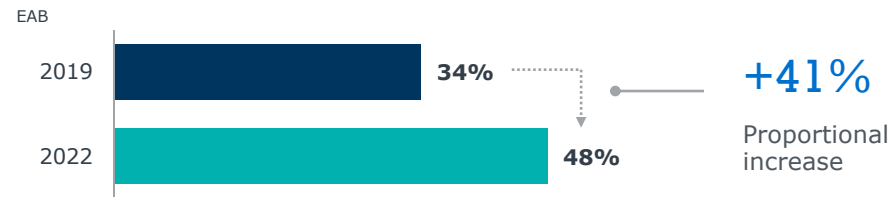
Portia Cook, High School Advisor
Advise TN
Marcus

Source: EAB interviews; Olivia Sanchez, “After the pandemic disrupted their high school educations, students are arriving at college unprepared,” The Hechinger Report; Jon Marcus, “How higher education lost its shine,” The Hechinger Report.

It should be acknowledged that the characteristics listed here may come across as critical of students. They are, however, more helpfully understood as reflections of students' changing context and the limitations of our current approaches to serving them. Our task as enrollment leaders and, more broadly, as educators, is to make sure we understand the needs of today's students and commit to better addressing them.

3 More Dependent on Adults

Percentage of students citing **parents** as an important source of information for their college decision



4 Under-Socialized

"Pandemic students aren't just academically underprepared; they're also under-socialized and **struggling to get along** with professors and with each other. We've actually seen this turn into physical violence on campus."

Vice President, Enrollment Management
A large public university in the Midwest

EAB

5 Disengaged

Kate Marley, a biology professor at Doane University, reports that 20% to 30% of students **don't show up** to class or complete assignments.

McMurtrie

Typical of stories from campuses around the country

Source: EAB research; Beth McMurtrie, "A 'Stunning' Level of Student Disconnection," The Chronicle of Higher Education.

Gen P's Distinctive and Troubling Mental-Health Profile

It's not just the pandemic

Various characteristics of today's college-goers that became apparent during the pandemic actually predate it (even if they went unnoticed before) and are likely to outlast it—a phenomenon that this page gives additional background on.

Broader factors at work

Recent cross-generational and cross-cultural survey work (excerpts from which are shown at right) suggests that broader cultural factors—including an ascendant culture of individualism and performance orientation, and diminished in-person social interaction due to the rise of the digital media—have had a disproportionately large negative impact on the mental well-being of young people relative to older generations. Affected areas include their cognition, adaptability, resilience, drive, motivation, mood, outlook, and, most strikingly, their “social self”—a measure of how they interact with, relate to, and see themselves with respect to others.

Findings from Sapien Labs' 2022 "Mental State of the World" Report

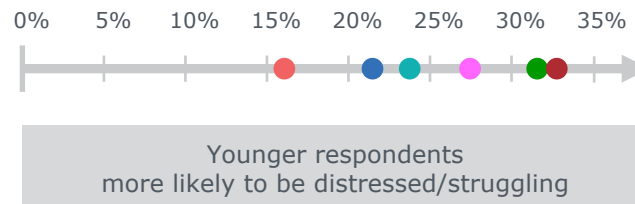
Drop in Mental-Well-Being Score

Respondents Aged 18–24 versus Those Aged 55–64



Difference in % Distressed/Struggling

Respondents Aged 18–24 versus Those Aged 55–64



Aspects of Mental Well-Being Assessed

- Cognition
- Adaptability and resilience
- Drive and motivation
- Mood and outlook
- Social self
- Mind-body connection

Source: "The Mental State of the World in 2022," The Mental Health Million Project.

A Rapidly Waning Commitment to College

Loss of interest

One striking aspect of Gen P, of special relevance to enrollment leaders, is their lower level of interest in higher education.

For reasons that are not entirely clear, but that might be based on preexisting factors exacerbated by the pandemic (see preceding page), the proportion of high schoolers thinking that college is necessary and planning to pursue a four-year degree decreased sharply during the pandemic—see the bar charts at right.

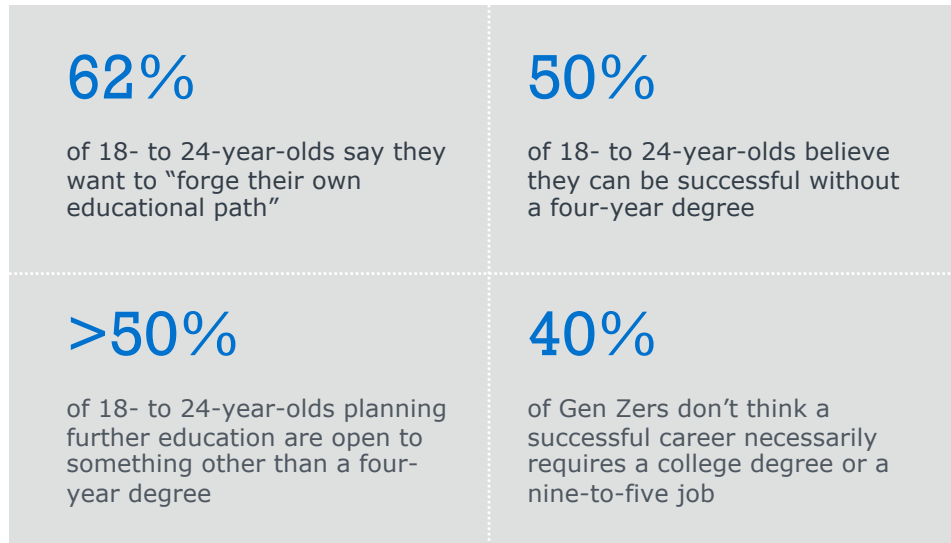
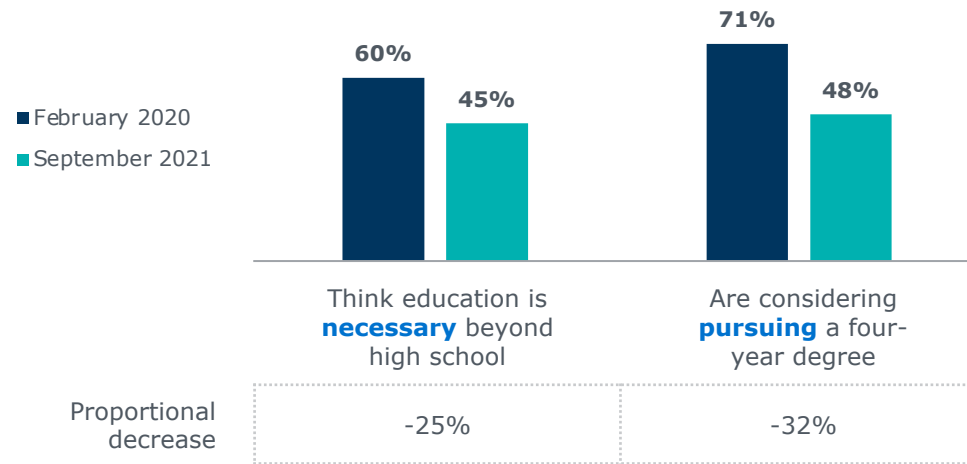
Alternative paths

The survey data in the table at right sheds additional light on the thinking behind Gen P’s disinclination to pursue college, which ranges from a desire to forge their own path to their broader conceptions of what constitutes a successful career.

Gen P is likely also affected by the general increase in negative sentiment regarding higher education across our nation’s population as a whole (see page 18)—a group that includes key influencers such as parents.

How Are High Schoolers’ Perceptions of Higher Education Changing?

Percentage of Surveyed 14- to 18-year Olds



Source: “Question the Quo,” ECMC Group.

Careers Focus and Gen P's Search for Connectedness

Looking for relevance

One interpretation of the data on disengagement among Gen P shown earlier is that they're eager to engage but are not finding what they want or need in higher education. Their attitudes toward connections between education and the world of work offer some evidence on this point.

Career connections

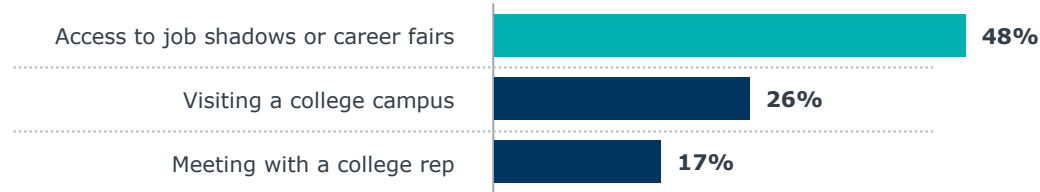
As shown in the upper chart on this page, when students who are undecided about going to college are asked what kinds of support would be most helpful in making their decision, by far the most commonly cited is access to job shadows or career fairs.

There's reason to believe that many colleges have ample room for improvement on this kind of career-connectedness. As shown in the lower chart, the percentage of colleges offering students the kind of work-related programs they're interested in is just 30%, versus 48% of students who cite such programs as important. Note that this is actually good news, insofar as it gives colleges something concrete to shoot for—it is, absolutely, a solvable problem.

What Kinds of Support Do Undecided Students Want?

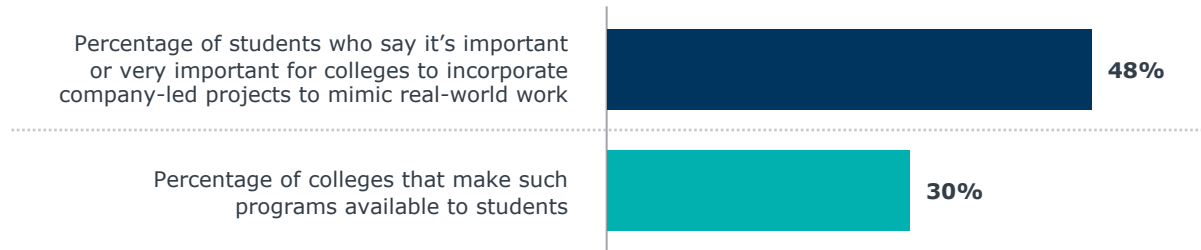
% of Survey Respondents

PowerSchool



Many Colleges Not Honoring Students' Interest in Real-World Work

Wiley



Source: "2022 Naviance Student Survey Report," PowerSchool; "The State of the Student 2022," Wiley.

Humanities Innovation

An overlooked preference

One underappreciated route to engaging Gen P—and one that appears contradictory at first glance, given students’ recent mass defection to career-oriented fields of study—is activating their interest in the humanities.

A key fact here is that students *like* the humanities. The number of high school students enrolling in humanities AP courses is increasing, for example, and two-year colleges are seeing a similar trend.

An integrated approach

While you should not ignore students’ concerns over their career prospects, focusing your academic offerings and your recruitment messaging narrowly on employability is probably a mistake. Among other things, it reinforces the kind of logic that is leading some students to skip college in favor of pursuing nondegree credentials.

Some schools, like those referenced at right, are giving students the best of both worlds via programs that integrate the humanities with STEM, business, and other more obviously career-focused fields.

Students Are More Interested in the Humanities Than Many Realize

“Humanities enrollment...is increasing among students seeking two-year associate’s degrees. And it is increasing among high-school students taking AP courses...The loss of humanities numbers isn’t happening in the collegiate pipeline, in other words. It is happening when these students walk through the university gates.”



Nathan Heller, “The End of the English Major”
The New Yorker

Forward-Looking Institutions Are Linking Students’ Interest in the Humanities with Their Focus on Employability



Emory University’s “Humanities Pathways” program

Helps faculty design syllabi that demonstrate connections between what students are learning and what potential employers are looking for

Supported by a \$1.25 MM Mellon Foundation grant



“Humanities marketing” at ASU

Humanities Dean hired a marketing firm to help “sell” his majors to students, teaches a course called “Making a Career with a Humanities Major,” introduced an interdisciplinary major called “Culture, Technology, and Environment”

Reversed a 10-year decline in humanities enrollment



STEM-humanities hybrids at Harvard

Dean of Humanities aims to disaggregate what different academic departments do, creating courses of study that honor students’ “real-world” interests.

50% increase in History of Science majors over five years

Source: Nathan Heller, “The End of the English Major,” *The New Yorker*.

Cost Is an Increasingly Powerful Driver of Student Behavior

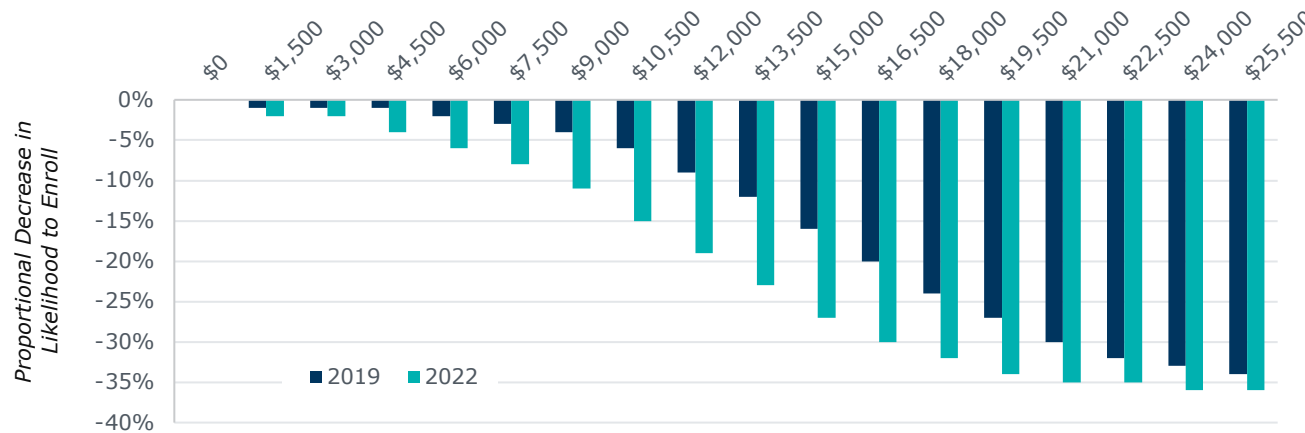
School-Level Models Show What Increasing Price Sensitivity Looks Like In Practice

One question regarding Gen P that has important implications for admissions strategy is what their distinctive psychological profile (including their lower opinion of college-going) and their material circumstances mean for their willingness to pay. To help answer that question, EAB's Financial Aid Optimization team undertook a statistical analysis of colleges' enrollment data to see whether the impact of out-of-pocket cost on likelihood to enroll has increased in recent years. The answer is "yes"—higher cost was significantly more likely to reduce students' likelihood to enroll in 2022 versus 2019.

Price-Sensitivity Analysis for a Representative Private College¹

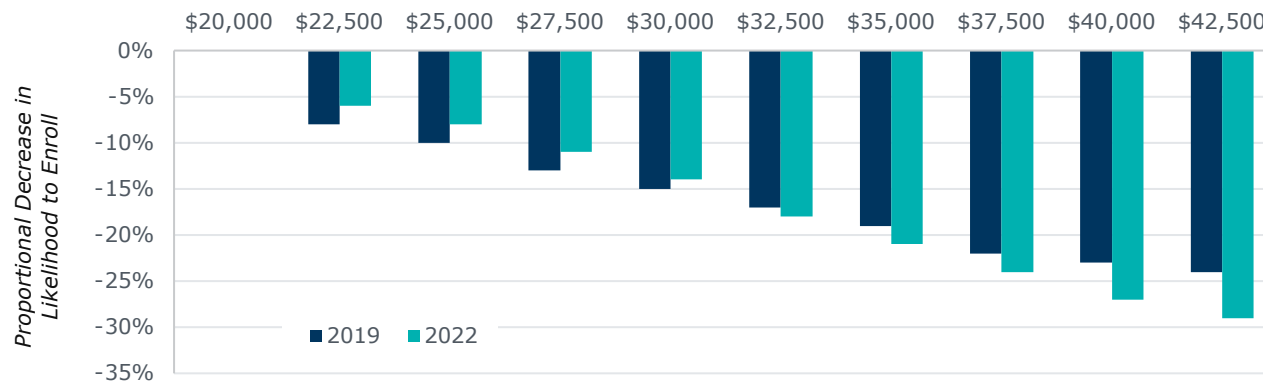
Impact of Increases in Out-of-Pocket Cost on Likelihood to Enroll, 2019 Vs. 2022


Lower-Income
 Students



Across the wider group of private institutions analyzed, aid applicants with the least ability to pay showed **greatest sensitivity** to out-of-pocket cost.


Higher-Income
 Students




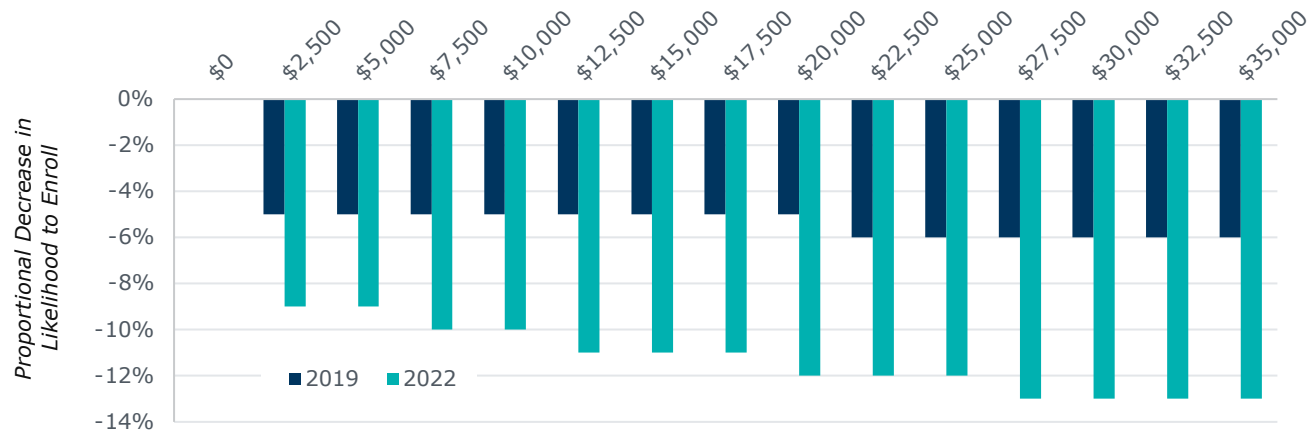
1) A large, private, urban, moderately selective research university in the Midwest, with an average cost after aid between \$35,000 and \$40,000.

This and the facing page offer a closer look at the impact of cost on likelihood to enroll, modeled for two representative schools, one private and one public. The charts show the proportional decrease in likelihood to enroll as out-of-pocket cost increases,¹ with each pair of bars showing the change relative to the next lowest level of out-of-pocket cost. As can be seen, in the vast majority of scenarios the same amount of cost increase caused a markedly larger drop in likelihood to enroll in 2022 than it did in 2019.

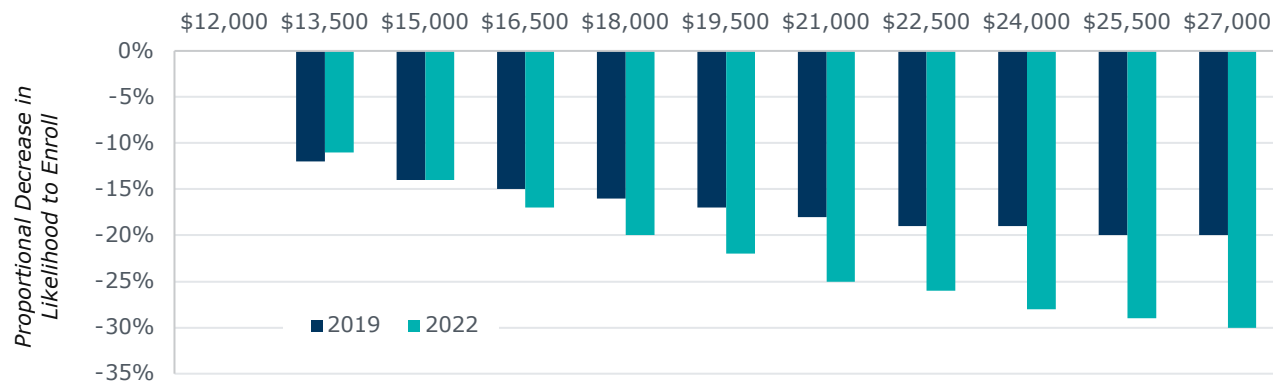
Price-Sensitivity Analysis for a Representative Public College²

Impact of Increases in Out-of-Pocket Cost on Likelihood to Enroll, 2019 Vs. 2022


Lower-Income
Students




Higher-Income
Students



Across the wider group of public institutions analyzed, aid applicants with higher ability to pay showed **greatest sensitivity** to out-of-pocket cost.

1) For example, a reduction in likelihood to enroll from 57% to 50% equals a 13% proportional decrease (because $[57\% - 50\%] \div 57\% = 13\%$).

2) A medium-sized, access-oriented, suburban, doctoral/professional institution in the Southeast with average cost after aid between \$15,000 and \$20,000.

Source: EAB research and analysis.



Priority 4

Increasing market share

SECTION

4

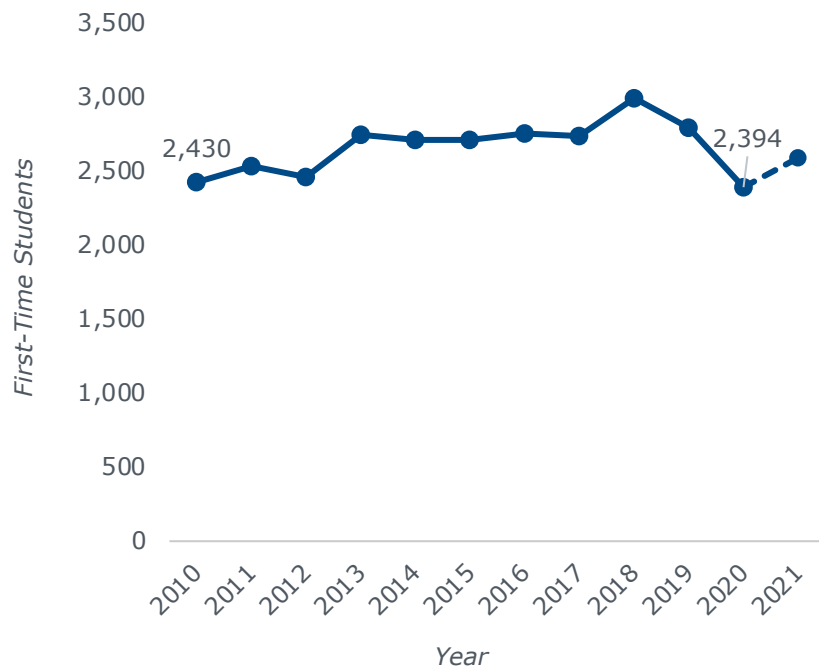
Understanding Your Inputs

Your Overall Enrollment Trend Can Conceal Important Underlying Developments

This section of our report addresses a crucial admissions concept that tends not to get talked about a lot, perhaps because it leads to uncomfortable conclusions—the imperative to grow market share. The underlying logic is simple; if the universe of college-goers continues to contract and the number of institutions stays the same, schools will need to win a bigger share of this shrinking market just to maintain current enrollment numbers (and that gain in share will, unavoidably, come at another institution’s expense). One implication for admissions teams is that it’s more important now than ever to understand what portion of your own enrollment is attributable to factors that are more or less under your control. This and the following page illustrate that concept with an example, based on data from an actual college we’ve pseudonymed as “EAB University.”

Fall First-Time Undergraduate Students

EAB University, 2010 to 2021



Historical Enrollments

2010-2020¹

-36 Students

-1% Pct. Chg.

EAB RESEARCH

**Strategic
Advisory
Services**

Included in This Analysis

- Fall first-time degree/for-credit certificate seeking undergrad enrollments
- Full-time and part-time students
- Students who enrolled in college courses during high school

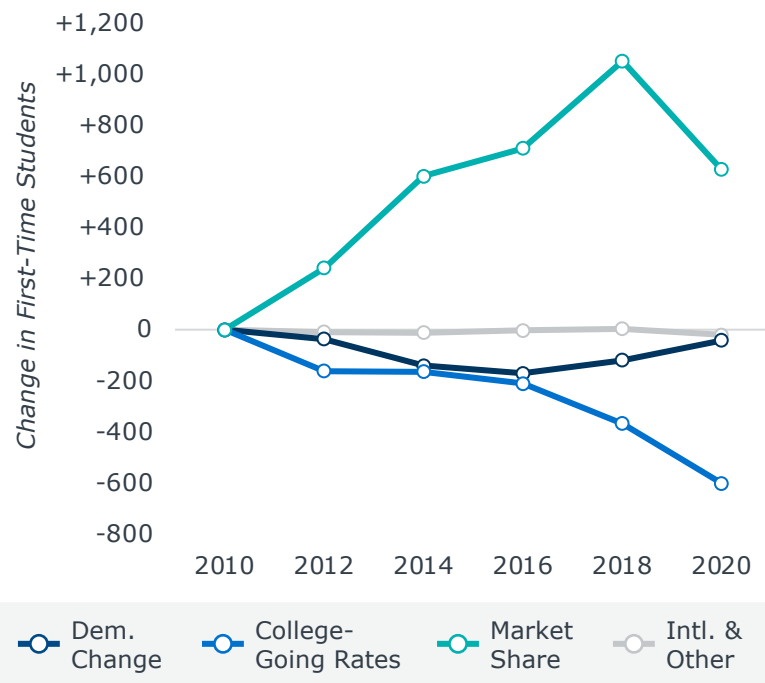
1) Data captured in graph goes up to 2021, but due to IPEDS data collection limitations, our deep-dive analysis begins in 2020.

Source: EAB analysis of IPEDS Fall Enrollment Data.

The facing page shows EAB University's overall enrollment trend from 2010 to 2021, which appears more or less flat and might suggest to a casual observer mediocre enrollment performance. But that interpretation could not be farther from the truth. The chart below disaggregates that same enrollment trend into its different inputs, showing the cumulative number of students the institution lost or gained due to the factors shown at right—an analysis based on a proprietary model developed by EAB's Strategic Advisory Services division. The analysis shows that EAB University actually produced substantial increases in enrollment via capture of market share, which offset losses due to decreases in the college-going rate within its market. Viewed this way, the story becomes one not of lackluster performance but of remarkable success in the face of adverse market conditions.

Cumulative Change, by Enrollment Force

EAB University



Cumulative Impact of Each Force from 2010-2020

Demographic Change

-41 Students

College-Going Rate

-601 Students

Market Share Change

+627 Students

International & Unknown Origin

-20 Students

Overall Enrollment Change

-36 Students

-1% change from 2010 levels



Source: EAB Analysis of IPEDS Fall Enrollment Data, WICHE Knocking at the College Door data, and American Community Survey data; EAB interviews and analysis.

Market Share Migrating Across School Segments

An expanding competitor group

One factor to consider as you're thinking through your market-share strategy is that your competitor group is expanding. Increasingly, schools from different segments are reaching further into each others' turf to make up for shrinking prospect pools in their own.

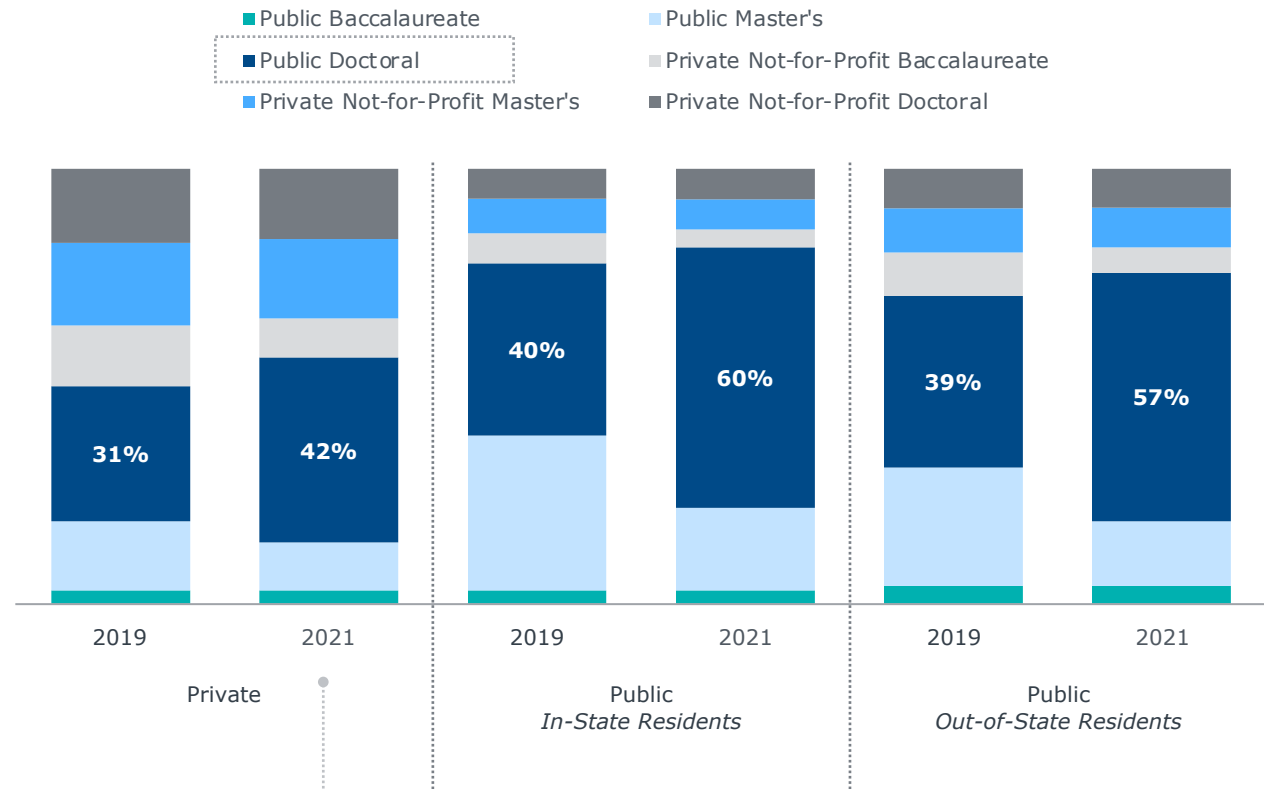
An accelerating trend

The phenomenon referenced above is not new—we've known for a few years that a growing number of students are choosing flagship publics over regional schools, for example.

But the trend has accelerated. With the widespread adoption of test optionality, students who might not previously have been able to get into more selective institutions applied, were admitted, and enrolled—a development that caused schools in the next tier down to lose students. These middle-tier schools also lost enrollment that previously came to them from less selective schools, the drop in college-going during the pandemic having been greatest for demographics served by these institutions.

Accelerating "Defection" to Flagship Publics a Case in Point

Destinations of Non-Enrolling Students for Master's-Level Institutions, 2019 Versus 2021



How to read the chart:

In 2021, of all students who were admitted to a private master's-level institution but did not enroll, 42% chose a public doctoral institution instead.

Source: Kim Reid, "Six Things You Need to Know about the Post-Pandemic Enrollment Environment," Eduventures Research.

Colleges Under Increasing Pressure to ‘Decommoditize’

Unique appeal

Schools that win more than their fair share of enrollment will increasingly be those who can effectively explain to the market what makes them different and special.

This can be tough, given that many institutions are set up to serve the same types of students in pretty similar ways. Things such as small class sizes, study abroad opportunities, and a picturesque campus, which feature so prominently in many schools’ pitches, are not going to do it. But what will?

A differentiation checklist

While the best approach will vary from school to school, it is possible to generalize in a helpful way about what makes for effective differentiators. Four characteristics are listed on the upper portion of this page.

The lower part of the page examines copy from an unnamed university’s website through the lens of the four characteristics of effective differentiators. See if you agree with the ratings assigned to each sample of copy in the table.

Four Characteristics of an Effective Differentiated Value Proposition

High Relevance	Your value proposition addresses key concerns and aspirations of core student populations you hope to serve and is expressed in their language.
Uniqueness	Your value proposition includes important approaches or assets for which you outperform your competition on at least one dimension.
Broad Applicability	Your value proposition benefits most, if not all, student segments you hope to serve and is available to students without them having to take special steps.
Provability	Your value proposition is supported by compelling evidence (data, social proof, etc.) aligned with how the students you serve measure success.

A Test Case

Examining One University’s Website Copy through a Value-Differentiation Lens

	High Relevance	Uniqueness	Broad Applicability	Provability
“Most students complete a co-op with the help of 80+ dedicated advisors, and 50% get offers from partner orgs after graduating.”				
“Our curriculum is designed to prepare graduates to capitalize on disruptive technologies like AI, automation, and virtual reality.”				
“We don’t just say ‘global’—we have 13 campuses around the world focused on regional workforce needs and innovation.”				

Best
 Worst

Source: EAB research and analysis.



Priority 5

Retooling the admissions office

SECTION

5

A Persistent Personnel Crisis

Challenges close to home

While the trends addressed earlier in this report are mostly related to phenomena “outside” of colleges, several key factors shaping the enrollment challenge are found closer to home—specifically, within admissions teams themselves. Problems of this sort are the focus of the following pages.

An ongoing staffing challenge

The defining challenge for admissions teams remains that of understaffing. The nationwide crisis that emerged during the “great resignation” has not gone away; if anything, it is getting worse.

Also discouraging is the fact that many schools have struggled to make headway on well-known drivers of employee satisfaction, with predictable negative consequences, including a big jump in the proportion of staff planning to seek employment elsewhere.

Hiring Getting Harder

62%

of surveyed college leaders said that hiring for staff and administrative jobs was harder in 2023 than it was in 2022

A Familiar Set of Concerns

What Higher Ed Workers Are Looking For in New Employment Opportunities

Higher pay	76%
Remote work	43%
Flexible schedule	32%
Promotion	30%

Serious Problems

18%

of surveyed college leaders said they were having “serious problems” hiring admissions and recruitment staff

Admissions highlight

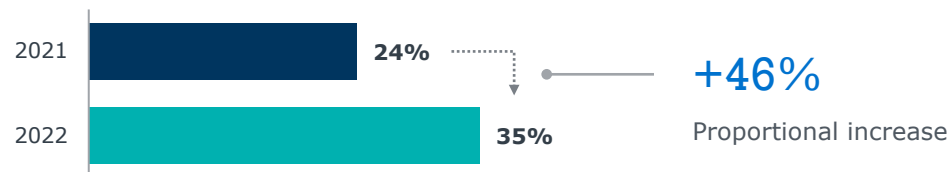
An Unmet Need

In-Person Status Versus Preference, Percentage of Admissions Staff

Are working completely or mostly on-site	66%
Prefer to be working completely or mostly on-site	35%

A Looming Retention Threat

% of Staff “Likely” or “Very Likely” to Look for New Employment in the Coming Year



Source: Jacqueline Bichsel and others, “The CUPA-HR 2022 Higher Education Employee Retention Survey: Initial Results,” CUPA-HR.

Why Enrollment Offices Are So Busy

Fewer staff, more work

One reason the staffing challenges described on the preceding page are especially troubling is that admissions office workloads continue to increase, not just on a per-staffer basis, but overall.

The big picture here is one of rapid growth in activity, as recruitment efforts are having to go both broader and deeper to deliver the same results.

Three contributing factors

This page shows three key facets of the trend described above.

First is that admissions offices are having to process a growing number of applications to yield the same number of students.

Second is an explosion of channels resulting from the accelerating evolution of communications technology.

Third is the higher intensity of the work required to recruit, evaluate, and yield students (as described in greater detail on the following pages).

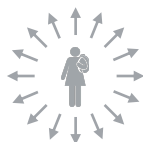
Recruitment Efforts Having to Go Broader *and* Deeper

Three Key Contributing Factors



More Applications

Students are applying to more schools each year, as the Common App and other application aggregators make doing so easier. Colleges are reinforcing this trend by looking ever farther outside of their legacy markets to compensate for shrinking prospect populations. Both factors are causing colleges' admit pools to grow.



More Channels

The accelerating evolution of communications technology is driving a "Cambrian explosion" of channels. On top of that, teens' rapidly changing channel preferences mean an ever steeper learning curve for admissions teams. Meanwhile, channels "pile up," as they are easier for admissions teams to adopt than to shed.



Higher Intensity

Decreased test-score availability and grade inflation have forced admissions teams to rely on more labor-intensive forms of applicant assessment. Growing unpredictability in the yield phase is making it harder for counselors to triage their attention across the admit pool, increasing the number of students they need to engage intensively.

Test-Optional Is Not Going Away

A major time commitment

One factor making admissions offices busier than ever is test optionality, which increases workloads in a number of ways. It requires admissions teams to manage a complex additional set of communications with prospective students based on explaining test-optional policies. It also increases the time required to read applications, insofar as the fairness and effectiveness of test optionality depend on close contextual candidate assessment.

Seemingly here to stay

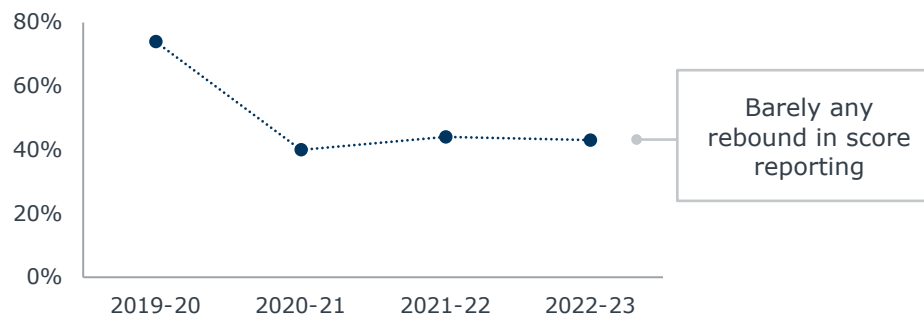
One important observation in this context is that test optionality, and the associated burden of extra work, are unlikely to go away anytime soon.

As shown in the chart, score reporting has barely rebounded after the dramatic drop that occurred at the start of the pandemic. And, as explained in the text below the chart, colleges have their own very good reasons to remain test-optional.

Percentage of College Applicants Reporting Test Scores

Common Application

Jaschik



Three Reasons Why Most Colleges Are Likely to Remain Test-Optional

EAB



Testing is widely believed to unfairly disadvantage **underrepresented students**.



Requiring test scores from applicants suppresses **application volume and enrollment**.



The number of students **opting out** of testing will likely continue to increase.

Source: Scott Jaschik, "Application Numbers Are Up," Inside Higher Ed; EAB research and analysis.

A Financial-Aid Wild Card

A profound reworking

Another factor poised to boost the intensity of enrollment work is the raft of changes to federal financial aid processes scheduled to take effect in the 2024-2025 admissions cycle, as described at right.

Far-reaching implications

Not shown are the many complex ramifications of this short and seemingly simple list of changes—modifications that will need to be made to colleges’ data systems, for example, or decisions about how to award students with a negative SAI, or re-evaluations that will need to be done of returning students’ aid eligibility.

Tackling these challenges would be hard enough with adequate staffing. Unfortunately, financial aid teams have been hit especially hard by staffing shortfalls—more than a third report shortages so extreme that they are unable to comply with Education Department administrative-capability requirements.

FAFSA Changes on the Horizon



A streamlined form

- FAFSA form will be shortened
- FAFSA will rely mostly on tax-return info



Expanded Pell eligibility

- Expected 10% to 25% increase in Pell recipients
- Projected 174,000 increase in number of eligible students



A new measure of families’ financial responsibility

- Student Aid Index (SAI) will replace the EFC
- Students can have negative SAI of up to \$1,500
- Family-farm and small-business assets will be factored into the SAI
- Aid eligibility will be based on family income and household size
- The SAI calculation will not account for siblings in college

Troubling Unknowns



- Impact on **yield rate**
- Impact on **aid budget**
- **Staffing** implications

Students with one sibling in college who will maintain their eligibility stand to lose almost \$3,000 each in institutional grant aid

No Mere Tweak

Knott

Projected Total Increase in Aid Eligibility Nationally

Institutional aid	Pell grants
\$3.7 billion	\$1.6 billion

“This is not just about making the form easier. It’s about **changing prices.**”



Phil Levine
Professor of Economics at Wellesley College
Lead author of Brookings report on the FAFSA changes

Source: EAB research and analysis; Katherine Knott, “How New FAFSA Will Change What Students Pay,” Inside Higher Ed.

An Affirmative-Action Wild Card

Potential peril

An additional factor that could upend enrollment office processes is change in the laws governing the consideration of race and ethnicity in admissions resulting from pending Supreme Court rulings.

School-specific implications

How big an impact these changes will have will depend on the specifics of the Court's decisions, which will likely not be made public until June 2023.

It will also depend on the particulars of individual schools' admissions practices. Institutions that currently rely on race-conscious approaches—primarily a subset of the nation's most selective institutions—have the greatest degree of potential exposure.

The picture appears less dire for the remainder of the nation's schools. While a ban on the consideration of race in admissions might, in theory, create heightened legal jeopardy for all colleges and universities—i.e., insofar as many students' applications include some indication of their race—judgments that would create the potential for widespread liability on this basis seem unlikely.

Implications for Enrollment Teams of the Supreme Court's Ongoing Deliberations on Affirmative Action in Admissions

The cases in brief

On October 31, 2022, the Supreme Court heard arguments related to lawsuits that Students for Fair Admissions brought against Harvard College and the University of North Carolina, in connection with these institutions' race-conscious admissions practices. In 2014, lower courts ruled in the schools' favor, finding that their policies complied with Supreme Court precedents. SCOTUS' current deliberations are considering whether those precedents themselves should be overturned.

What will the future bring?

While the Court is widely expected to declare affirmative action unconstitutional, the practical implications of that decision for colleges and universities will not be understood until the details of the judgments are made known, most likely not before June 2023. Possible outcomes might include anything from incremental restrictions on currently widespread race-conscious practices to an outright ban of the consideration of race in admission decisions.

What should enrollment leaders do?

Until the particulars of the Court's judgments are known, admissions teams will lack a firm basis for decisive action (or even for contingency planning). That said, there are things you can do to boost your odds of coming up with creative solutions to whatever new challenges the Court's decisions might present and to otherwise make sure you hit the ground running come June—for example:

- Familiarize yourself with the basic legal issues involved.
- Inventory all the ways that race shows up in your current admissions processes.
- Study up on race-neutral alternatives to race-conscious admissions practices.
- Create cross-departmental working groups to facilitate your efforts.
- Talk to your legal counsel.
- Line up expert resources you may call upon when the time comes to act.

Direct Admission: Early Days for a Potentially Transformative Innovation

Grasping the basics

One phenomenon with potentially far-reaching implications for enrollment office processes is direct admission.


The term can be a little confusing, because the various examples of “direct admission” currently in the field differ in important ways. But grasping a few basics, as explained at right, can help you quickly understand any given program you may encounter.

Future promise

While results from direct-admission pilots are encouraging, it is still too early to say how large and consistent a positive impact it might have. Looking to the future, the most interesting question remains that of its generalizability—i.e., whether most colleges might eventually recruit the majority of their students via direct admission.


Another key consideration is the extent to which direct admission might actually decrease the application-generation burden on admissions staff and/or potentially shift the focus of their activity from demand-generation to yield management.

Two Animating Principles of Direct-Admission Programs



Proactive admission offers from colleges

Colleges make admission offers to students who have not applied to them (and may never even have heard of them)



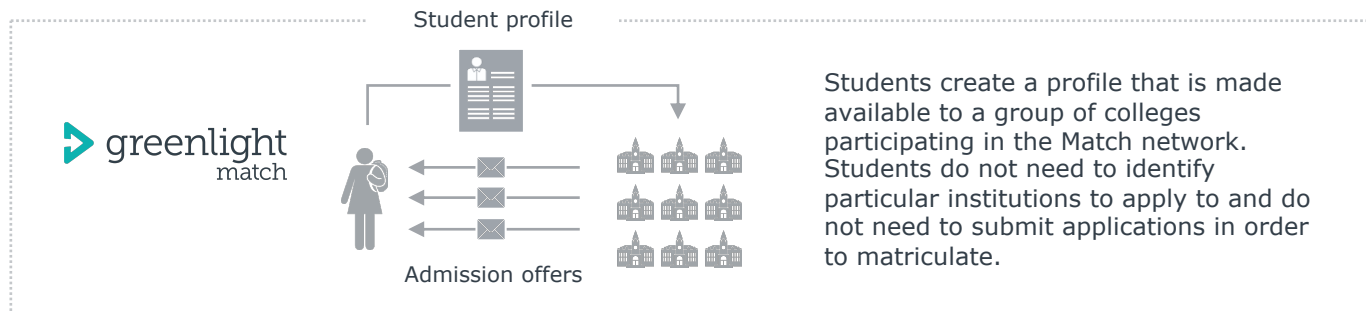
Streamlined student-facing processes

Steps students must take to receive/accept offers (including information they must provide) are minimized

Most or all direct-admission programs still require students to fill out something resembling an application at some point prior to matriculation—e.g., the college’s standard application or a standard profile managed by the direct-admission program’s sponsor (see below for an example of the latter). Some programs require students to do this before receiving an offer, some after.

An Example of What It Looks Like in Practice

Greenlight Match’s “Reverse Admissions” Approach



Results from a Greenlight Match Pilot



1) A pseudonym.

Source: EAB research and analysis.

How to Boost your Team's Capacity

A multifaceted challenge

The defining challenge of admissions office management across the near future will remain that of finding the capacity needed to effectively meet a rapidly growing list of demands.

This will be achieved, in part, by filling open staff positions. But given the difficult labor market and colleges' typically limited ability to compete on compensation, other means of increasing your team's bandwidth will take on outsized importance. Three key ones are shown at right.

A first priority

Of the three approaches, improved personnel management should be a first priority.

One reason is that it solves multiple problems at once, positively impacting staff retention, recruitment, and productivity. Another is that higher education's adoption of related best practices tends to lag that of industry—i.e., most admissions teams have lots of room for improvement and correspondingly ample potential for relatively easy wins.

Three Keys to Increased Bandwidth



Improved personnel management

Better staff management is the surest route to improved retention, which is, in turn, the best way of maintaining necessary admission-office capacity. Related best practices often also improve staff productivity and recruitment.



Outsourcing

Because of their scale and specialization, third parties can often perform admission-office functions more efficiently than you yourself can, and to an equal or higher standard. At some institutions, funds associated with unfilled staff positions can be reallocated to this purpose.



Improved process efficiency

In addition to tried-and-true process-efficiency approaches (e.g., identifying and cutting unproductive tasks), enrollment leaders have access to a rapidly expanding AI-based toolkit for triaging and automating admissions work.

Best-Practice Adoption Rate ¹	
Percentage of Surveyed Colleges	
Exit interviews	71%
Family-friendly benefits	39%
Stay interviews	27%
Structured career pathways	22%
Retention training for managers	7%

A partial list of highly outsourceable admission-office functions:

Recruitment marketing, financial aid optimization, personnel training, data-systems integration, compensation analysis, transcript data entry, application reading

Case in point

Golden Coast College,² a highly selective school that has very high application volume and is steadfastly committed to holistic reading, is using AI to more effectively match intensity of application review to individual student profiles.

1) From an EAB survey of higher education leaders. The question they were asked was "What initiatives has your institution tried since July 2021 to improve staff recruitment and/or retention?" See EAB presentation "Securing Competitive Advantage Amid Historic Staffing Shortages."

2) A pseudonym.

Source: EAB's 2022 Talent Questionnaire; EAB interviews and analysis.



Self-Tests for Enrollment Leaders

Assessing your readiness on the five strategic priorities

SECTION

6

How to Use the Self-Tests

A structured reflection on your current capabilities

The five self-tests on the following pages consist of statements that describe an enrollment office well-positioned to tackle the challenges outlined in the corresponding sections of this report. Read through the statements and check the boxes for ones you feel accurately reflect, on balance, your team's current capabilities, practices, and knowledge. Then tally the checks you've awarded yourself for each self-test, enter the numbers in the boxes below, and see how your performance compares across the five categories.

Keep in mind that the self-tests are built on a representative sampling, rather than an exhaustive list, of capabilities, meant to give you a general sense of how strong you are in the area the self-test addresses; adjust your ratings if you feel they do not account for important related capabilities you have. And do not be surprised or discouraged if you find yourself checking a small number of boxes; the self-tests are calibrated to a level of performance beyond what most teams can currently claim.

From reflection to action

As you're prioritizing efforts at improving your department's overall performance, focus your greatest energies on the sections where you scored lowest, as this is where you'll have the greatest opportunity for improvement. Conversely, look to leverage the strengths corresponding to sections where you scored especially well.

Enter your score for each self-test here

↓

Score Summary	<input type="text"/>	Self-test 1: Understanding decreasing demand for higher education
	<input type="text"/>	Self-test 2: Navigating a hostile cultural context
	<input type="text"/>	Self-test 3: Serving a new kind of student
	<input type="text"/>	Self-test 4: Increasing market share
	<input type="text"/>	Self-test 5: Retooling the admissions office

Source: EAB research and analysis.

Self-Test 1

Understanding Decreasing Demand for Higher Education

Different implications for different school segments

- 1 We are aware of the different ways in which decreasing demand affects different school segments and understand the vulnerabilities and opportunities specific to our segment. We understand how our institution is positioned relative to other schools in our segment to address the main causes of decreasing demand.
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Competition from non-college entities

- 2 Our institution's leadership knows the main alternatives to higher education that students are choosing over college and have assessed our ability to compete with each (e.g., offering our own à la carte, stackable credentials to compete with those offered by third parties outside of higher education).
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The student's perspective

- 3 We know which of our nonyielding students ended up not enrolling at any college, and we know why they did not. Our institution has made changes to our recruitment processes and to our student-facing offerings, including our academic programs, targeting these drivers of nonconsumption.
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Market versus institutional factors

- 4 We distinguish between market forces decreasing demand and local factors, directly under our institution's control, that cause fewer students to enroll—e.g., overly complicated student-facing procedures or insufficient student support leading to summer melt—and are implementing fixes for the latter.
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Lasting versus temporary conditions

- 5 Our planning recognizes the possibility that some portion of the recent decrease in demand for higher education is a temporary effect of the pandemic and of the extraordinary labor market conditions that arose in tandem with it. We are poised to capitalize on a potential rebound in demand.

Source: EAB research and analysis.

Self-Test 2

Navigating a Hostile Cultural Context

Teeing up a value-messaging moon shot

- 1 We recognize the need for radical marketing innovation aimed at countering increasingly widespread negative perceptions of higher education and are preparing to make related investments of time, effort, and financial resources.
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Candidly assessing your ROI

- 2 We know, roughly speaking, how much financial return average students get from their investment in an education at our institution. We are involved in efforts to substantively improve the value of our school's offerings, including our academic programs (e.g., by contributing market research).
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Understanding your audience

- 3 We understand the political and cultural values of the core student populations we serve, as well as those who we don't currently serve but would like to. We understand how the values of the two groups overlap and how the values of both relate to those of our institution.
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Signaling a favorable campus climate

- 4 We have audited the recruitment-active content our institution produces, including academic department pages on our .edu, to ensure that it is promoting values consistent with those of our core student populations (e.g., highlighting portions of our curriculum that address diversity, equity, inclusion, and justice).
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Putting the discussion back on your terms

- 5 Rather than reinforcing a narrow, transactional view of higher education, our communications with the market make a case for the distinctive value of an education from our institution—crucial benefits students will get from us that they will never get from a coding boot camp or data-analytics credential.

Source: EAB research and analysis.

Self-Test 3

Serving a New Kind of Student

Streamlining the path to matriculation

- 1 We have streamlined our student-facing admissions processes, reducing to a minimum steps students must take to inquire, apply, receive aid offers, and enroll. We are test-optional and are evaluating potential participation in direct-admission programs.
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Engaging adult influencers

- 2 We have communication streams, events, and other forms of outreach designed specifically for parents, high school counselors, and other adults on whom students increasingly depend for advice on college-going. These forms of outreach focus on channels we know they prefer and messages we know resonate with them.
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Acknowledging student stress

- 3 We have adapted our admissions processes to better serve mentally stressed and academically underprepared students. We let students know that we understand their predicament and are ready and able to help them after they enroll. We avoid messaging that might come off as condescending or disparaging of students.
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Conveying relevance

- 4 Our recruitment-active communications, including academic department homepages on our .edu, tie our academic programs to careers and to large, important issues that students care about, such as the environment and social justice. The connections we make are plausible and compelling (as judged by students).
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Addressing families' cost concerns

- 5 We have a solid understanding of how much debt students from particular income backgrounds would need to take on to study at our institution. We have an internal benchmark we use to identify students at risk of taking on excessive debt and have developed strategies for counseling them.

Self-Test 4

Increasing Market Share

Market-share data

- 1 We know our market share (i.e., the percentage number). We know if our market share is trending up, down, or flat. We know how much of our change in freshman enrollment year to year is due to changes in market share versus changes in local demographics and college-going rate.
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Data on competitors

- 2 We know, based on data, who our primary competitors are—i.e., to whom we are losing market share and from whom we might win market share. We know approximately how much of our loss or gain in market share is attributable to each competitor.
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Differentiated value proposition

- 3 Our institution's value proposition is compelling to the main student populations we serve (a fact we have verified through surveys and other means), easy to communicate, easy to distinguish from that of our main competitors, and difficult to replicate.
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Complete capture of prospects

- 4 We use a comprehensive portfolio of audience sources and audience-sourcing best practices to capture the complete universe of prospective students who are a good fit with our institution as early in their high school careers as possible. We engage these prospects with proven recruitment-marketing practices.
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Net-price optimization

- 5 We use advanced financial aid optimization methods to understand the impact of our pricing on students' likelihood to pick our institution. We analyze our net price relative to that of our main competitors in the context of a comparison of our value propositions.

Self-Test 5

Retooling the Admissions Office

Personnel-management best practices

- 1 Our adoption of personnel-management best practices is more or less in line with that of industry (especially those industries to which we are most likely to lose staff). To the extent that there are gaps, we have identified practices that would be most important to implement first and have a plan for rolling them out.
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Flexible-work policy

- 2 We have talked to our admissions staff about their remote-work preferences. We have adopted flexible-work policies that enable staff to act on their preferences whenever doing so would not obviously impede our team's ability to get essential work done.
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Outsourcing

- 3 We have outsourced tasks that third parties can perform with comparable or better outcomes, with a particular focus on work that claims large amounts of admissions office staff time and tasks in which our staff are least invested. Where permissible, we have redirected funds from unfilled staff positions to fund these efforts.
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Race-conscious admissions

- 4 We have analyzed our admissions processes to identify points at which information regarding students' race or ethnicity comes into play in preparation for the Supreme Court's verdict in the SFFA cases. We have spoken to our institution's legal counsel about how additionally to prepare for potential fallout from the verdict.
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Direct admission

- 5 We have a clearly articulated stance on our motivation for engaging with (or avoiding) direct admission. If we do plan on pursuing direct admission, we have figured out how we will know when the time is right to participate and which program(s) we are likely to partner with and why.

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