Survey Explanations and Instructions

Organizational Design and Strategy Benchmarks for Professional, Continuing, and Online Education

Please note, the aim of this survey is provide a single, consistent instrument across all partner geographies, and therefore better data comparisons. As such, we have added additional language and descriptors to make the questions and supporting materials accessible to all audiences. That said, for sake of consistency, some spellings and language default to North American norms.

How to Use This Document

This guide provides explanations and instructions for the Organizational Design and Strategy Benchmarks for Professional, Continuing, and Online Education (PCO) survey. You will find guidance on how EAB defines key terms for the purposes of this survey, as well as instructions for interpreting questions. In some cases, we explain the goal for the question to provide additional context that may help shape your responses.

The document begins with an "Overall" section which covers terms, definitions, and context that apply throughout the survey. Then, you will find sections and subsections aligned to each specific survey module. Within each subsection, terms are organized **alphabetically**. Terms related to a specific question will reference the question number.

Please note that many questions in the survey also include pop-up information that offers additional context, examples, and definitions. You can access this information by hovering your mouse over underlined survey text.

If you have questions not answered in this guide, please visit our FAQ, email us at PAEbenchmarking@eab.com, or schedule time one-on-one with an EAB expert to talk through your questions.

Overall

Bachelor's/undergraduate, non-adult degree completion: The bachelor's/undergraduate program does not require a minimum credit amount to enroll.

Fiscal Year: The survey will ask for data from FY22, FY23 and projections for FY24. User input should reflect your local definition of the fiscal year, for instance:

North American fiscal year (FY2X) is typically July 1, 202X - June 30, 202X
UK fiscal year (FY2X) is typically 1 August 202X - 31 July 202X
Australian fiscal year (FY2X) is typically 1 January 202X - 31 December 202X

FTE: Full-time equivalent, used exclusively to refer to staffing (students are measured in headcount). An individual working full-time (i.e., 40 hours per week) counts as 1.0 FTE, while an individual working part-time at 20 hours per week counts as 0.5 FTE. Questions requesting FTE counts require users to add up the FTEs for a given function. In this example, the two employees would sum up to 1.5 FTEs.

Instructor(s): Includes all individuals who teach courses, regardless of title, contract type, or course type.

OPM: Online Program Manager; a provider of products and services largely meant to outsource support for online programs.

Vocational/technical education: For example, a program on automotive technology or circuitry.

Outcomes Module

This module captures data on the previous and current years' fiscal performance, unit staffing, programmatic offerings, and services delivered in order to associate annual resources and activities with annual outcomes.

Performance Questions

Graduate employment rates: What percent of graduates were employed post completion of programs offered or supported by your unit. Do not provide overall institution graduate employment rates or rates for programs you do not offer/support. *(See Q7, Q8)*

In-unit headcount: All enrollments in FY23 and enrollment goals for FY24 across all offerings within your unit; NOT those supported by your unit. *(See Q7, Q8)*

Professional/continuing/online headcount institution-wide: This number includes in-unit headcount as well as outside unit headcount. *(See Q7, Q8)*

Unit gross margin: Calculate the unit gross margin as the total revenue brought into the unit with cost to offer education (i.e., costs strictly tied to delivering course content, such as instructor compensation or course materials) subtracted, divided by total revenue. This will result in a percentage. *(See Q7, Q8)*

$$\frac{\text{(Total revenue)} - \text{(Cost to offer education)}}{\text{Total revenue}} = \text{Unit gross margin (\%)}$$

Unit net margin: Calculate the unit net margin as the total revenue brought to the unit with both costs to offer education (i.e., costs strictly tied to delivering course content, such as instructor compensation or course materials) and operating expenses (i.e., staff compensation, marketing, technology support, etc.) subtracted, divided by the total revenue. This will result in a percentage. *(See Q7, Q8)*

$$\frac{\text{(Total revenue)} - \text{(Cost to offer education)} - \text{(Operating expenses)}}{\text{Total revenue}} = \text{Unit net margin (\%)}$$

Unit revenue: Total revenue brought to the unit without subtracting any expenses. *(See Q7, Q8)*

Unit total credit hours delivered: All credits hours delivered in FY23 and credit hour delivery goals for FY24 across all offerings. *(See Q7, Q8)*

Staffing Questions

Contract-based/adjunct instructors: Includes instructors from other academic departments that your unit pays to teach your programs (e.g., business professor who teaches an evening Management 101 course separately contracted from their faculty teaching load) <u>and</u> instructors not otherwise affiliated with the institution. It does <u>not</u> include instructors that other departments employ to teach classes or courses affiliated with your unit's offerings (e.g., school of business hires adjunct instructors to teach Marketing 101 online). (*See Q9)*

Staff: All non-instructor employees (e.g., admissions staff, marketing staff). *(See Q9)*

Programmatic Offerings Questions

Q10 asks users to "*indicate whether and how the following programs are delivered by your institution*," and to **select all options that apply** to your institution. Below are the response options and what they indicate:

- **In our unit**: A version of this program type is offered *directly* through your unit, regardless of other unit/college's involvement with support or delivery.

- **Elsewhere with our support/involvement**: A version of this program type is offered through another unit/college within your institution and your unit enables its operation (e.g., you offer delivery, recruitment, or design support to a program offered by the computer sciences department).
- **Elsewhere without our support/involvement**: A version of this program type is offered through another unit/college within your institution and your unit is not involved with its operation at all (e.g., the computer sciences department independently provides an adult degree completion bachelor's degree).
- **Outsourced**: A version of this program type is offered through a third-party vendor (e.g., via 2U or Academic Partnerships).
- **Not offered at my institution**: No version of this program is offered within your institution.

(See Q10)

Unit Operations Module

This module delves deeper into financial models, staffing and instructor models, and external vendor relationships, in addition to capturing information on your unit's history. We will be able to share correlations between unit operations and unit outcomes.

Financial Information

Centralized or Strategy-based, in reference to institutional budget model: Unit budget is mostly or entirely set by senior-most central institution leaders to match institutional strategic goals. *(See Q3)*

Contribution to Central Administration, as an annual expenditure: The portion of unit revenue required to be returned to central administration (e.g., a required contribution toward overhead, a required contribution to a central innovation fund, and/or a standard off-the-top percentage owed to the general budget). *(See Q11)*

Incremental/historical, in reference to institutional budget model: Budget is based on unit allocation in the previous year, plus or minus an adjustment equal to the overall change in institutional resources. *(See Q3)*

Overall margin: Consider this the total revenue brought into the unit with cost to offer education (i.e., costs strictly tied to delivering course content, such as instructor compensation or course materials) subtracted, divided by total revenue. This will result in a percentage. *(See Q13)*

$$\frac{(\text{Total revenue}) - (\text{Cost to offer education})}{\text{Total revenue}} = \text{Overall margin (\%)}$$

Program's net revenue, in reference to revenue-share agreements: Calculate the total revenue brought in by the program with both costs to offer education (i.e., costs strictly tied to delivering course content, such as instructor compensation or course materials) and operating expenses (i.e., staff compensation, marketing, technology support, etc.) subtracted. *(See Q5, Q6)*

$$(\text{Total revenue}) - (\text{Cost to offer education}) - (\text{Operating expenses}) = \text{Program net revenue}$$

Responsibility Center Management (RCM), in reference to institutional budget model: Units are wholly/largely responsible for their own revenues and expenditures. *Applies to units which consider their budget model fully or partially RCM. (See Q3)*

Revenue-share agreement: An agreement with another academic unit within your institution in which the PCO unit and a partner unit each receive a portion of program revenue. *(See Q4, Q6)*

Surplus balance: Any money the PCO unit is allowed to carry forward from one fiscal year to the next. *(See Q7)*

Technical infrastructure, in reference to being an annual expenditure: For example, software investments, like those made to maintain or expand customer relationship management (CRM) software. *(See Q11)*

Technology platforms: For example, platforms like a learning management system or badging software. *(See Q14)*

Zero-based, in reference to institutional budget model: unit starts each fiscal year with zero dollars and must request funding for existing and proposed programs and services. *(See Q3)*

Staffing and Instructors

Administrative support staff, in reference to unionization: include staff in clerical positions such as office administrators, administrative assistants, or executive assistants. *(See Q28)*

Compensation varies based on complexity, in reference to compensation for instructors: For example, an instructor receives lower pay for introductory coursework; an instructor receives higher pay for complex or upper-level coursework. *(See Q17, Q21)*

Program support staff, in reference to unionization: include staff who work on instructional design and/or curriculum development. *(See Q28)*

Student advising, in reference to headcount and FTE distribution, include staff who help students decide on their course schedule, classes, or academic plan. *(See Q29)*

Student coaching, in reference to headcount and FTE distribution, include staff who assist with guidance on study skills, navigating the institution, or accessing non-academic support services (e.g., mental health services). *(See Q29)*

Technology support staff, in reference to unionization: include staff who maintain technology and/or offer student technology support. *(See Q28)*

Third-party content provider, in reference to avenues used for creating course content: For example, a third-party vendor provides the course curriculum. *(See Q24)*

Tutoring, in reference to headcount and FTE distribution, include staff who provide content-specific study support. *(See Q29)*

External Vendors

Annual fee for service: If the fee varies for the particular vendor you are providing information for please provide the average across variations. *(See Q30)*

Revenue Share: Identify the percentage of revenue your unit shared/shares with the vendor identified. *(See Q30)*

Portfolio Module

This module addresses program offerings, program launch and discontinuation, pricing, and student support. Offerings, policies, and support services will again be correlated with unit performance to identify best practices.

Program Offerings and Changes

Local employers, in reference to avenues used for generating labor market insights: For example, generating labor market insights through an economic development council. *(See Q6)*

Student demand data: Degree enrollment or completions data originating from IPEDS, StatsCan, or another government or statistical body which oversees the reporting of program enrollments or completions by students. *(See Q7, Q8)*

Third-party vendor, in reference to avenues used for generating labor market insights or student demand data: Contracting with a vendor such as EAB or Hanover to generate labor market insights and/or student demand data. *(See Q6, Q8)*

Program Launch and Sunsetting/Discontinuation Practices

External market data, in reference to decisions on program launch: Using data sources such as Lightcast, IPEDS, BLS, StatsCan, or another government or statistical body which produces market data. *(See Q11, Q14)*

Student outcomes, in reference to decisions on program sunset/discontinuation: For example, using items such as student career growth or industry certification pass rates data to support decisions on program sunset/discontinuation. *(See Q14)*

Program Pricing

Institutional precedent/history, in reference to what determines what you will charge students for your programs: Pricing policies are determined by how your unit has priced similar types of programs in the past. *(See Q20)*

Student Support

Student advising: Include staff who help students decide on their course schedule, classes, or academic plan. *(See Q22, Q23)*

Student coaching: Include staff who assist with guidance on study skills, navigating the institution, or accessing non-academic support services (e.g., mental health services). *(See Q24, Q25)*

Web-based advising/coaching platform, in reference to staffing models for advisors/coaches: The unit deploys an application- or internet-based advising/coaching platform to support students. *(See Q23, Q25)*

Marketing Module

This module encompasses your marketing budget, your intended geographic reach, and performance across the marketing funnel. Marketing practices will be correlated with performance, and marketing performance metrics will be shared for benchmarking as well.

Marketing Budget

Q3 asks users to indicate the percentage of their marketing budget allocated to each listed channel. Below are the channels and examples therein:

- **Social Media**: Allocating marketing dollars to companies such as Facebook, Instagram, TikTok, Snapchat.
- **Paid Online Ads**: Allocating marketing dollars to services such as Google AdSense.
- **Transit/outdoor advertising**: Allocating marketing dollars to advertisements such as billboards, bus wraparounds.
- **Print media**: Allocating marketing dollars to advertisements within media such as newspapers, industry publications.
- **Traditional broadcast media**: Allocating marketing dollars to cable television, radio.
- **Streaming media**: Allocating marketing dollars to companies such as Spotify, Pandora, Hulu.
- **Third-party vendors**: Allocating marketing dollars to a third-party marketing service.

(See Q3)

Proportionally to our portfolio mix, in reference to how you determine where to invest marketing dollars: If 50% of your unit's programs are master's programs, 50% of your marketing dollars go to marketing master's programs. *(See Q5)*

Labor market data, in reference to how you determine where to invest marketing dollars: Your unit uses data from avenues such as relevant job postings, employment levels. *(See Q5)*

Funnel Metrics

Bounce rate: The percentage of visitors to program webpages who navigate away from the website after viewing only one page. *(See Q30, Q31)*

$$\frac{\text{Single-page website sessions}}{\text{All website sessions}} = \text{Bounce rate (\%)}$$

Click-through rate: The number of clicks your website advertisements receive divided by the number of times your website advertisement is seen. *(See Q28, Q29)*

$$\frac{\text{Website visits via online advertisements}}{\text{Total online advertisement views (i.e., impressions)}} = \text{Click-through rate (\%)}$$

Inquiries: Students asking questions about your program(s), including submissions of Request for Information forms, attendance at information sessions, etc. *(See Q24, Q27)*