

# Imperatives for the Post-Vaccine Institution

From Crisis Management to Competitive Transformation

# Joining Us Today Meet our EAB Expert



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#### **Fun Fact:**

I spent over 50% of my growing up years outside the US – living in Morocco; Venezuela; Belgium; the United Kingdom (where I graduated from high school).

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We help schools support students from enrollment to graduation and beyond

**ROOTED IN RESEARCH** 

8,000<sup>+</sup> Peer-tested best practices

**Enrollment innovations** 500<sup>+</sup>

tested annually

**ADVANTAGE OF SCALE** 

1,900+ Institutions served

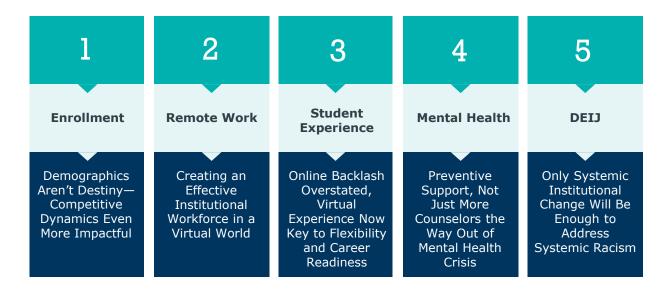
4.1 M<sup>+</sup> Students supported by our SSMS

**WE DELIVER RESULTS** 

Of our partners continue 95% with us year after year, reflecting the goals we achieve together

> Find and enroll your Support and graduate right-fit students more students ENROLLMEN, LAST STUDENT SUCCESS INSIGHTS EXPERTISE TNSTITUTIONAL SUCCESS > Prepare your institution for the future

## Five Imperatives for the Post-Vaccine Institution



# 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



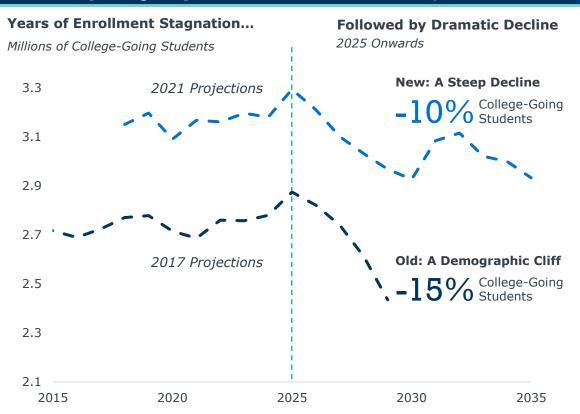
#### **Now: Preparing to Compete Harder** for Changing Student Audiences

Demographic Cliff Not Quite So Steep, But Still Widespread

Market Share Decisive Factor for Most Growth, not Demographics

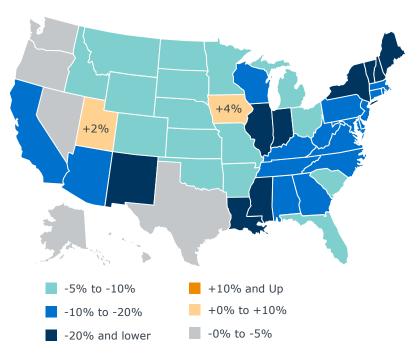
Long-Term Growth Strategy Expands Beyond Undergrads

## An Only Slightly Less Pessimistic Projection



#### Falling Birthrates Will Hit Institutions Across the US

Percent Change in the Population of 18-Year-Olds, 2025-2035



# **Demographics Hit Regional Institutions Much Harder**

Change in demand, 2025-2035

**-6%** Private Institutions

-10% Public Institutions

-1% 'Elite'
Top 50¹ research
universities & liberal
arts colleges

-5% National
Top 50-100¹ research
universities & liberal
arts colleges

-10% Regional
Ranked¹ outside of
Top 100

#### Market Share a Powerful Determinant of Undergrad Enrollment Growth

What Demographic Change Looks Like The total number of students (Demographic Change)



#### 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 Impact<sup>1</sup> on Enrollments vs. Demographics

37% Of enrollment change caused by demographic shifts Institutional average<sup>2</sup> (2008 to 2018)

63% Of enrollment change caused by changes in market share Institutional average<sup>2</sup> (2008 to 2018)

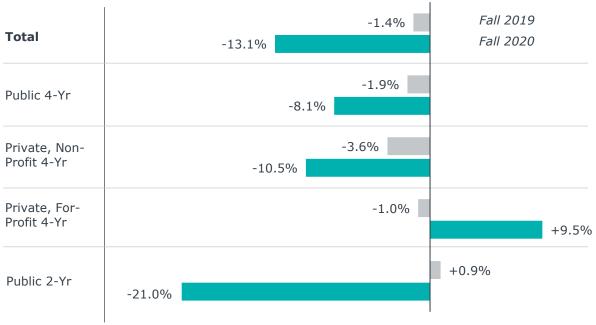
<sup>1)</sup> Impact calculated as a share of the absolute year-on-year change

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

# 9

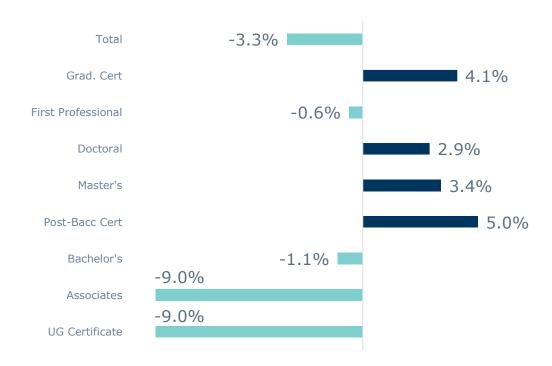
#### First-Time Beginning Undergraduate Enrollment Changes by Sector

First-time Beginning Student Enrollment Changes - Total



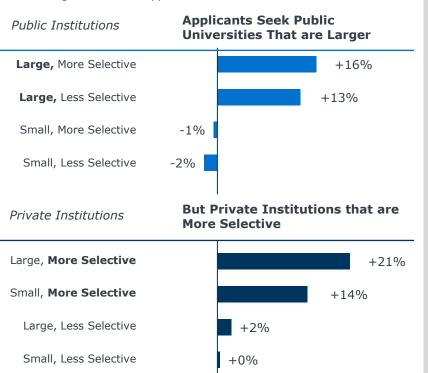
## Change in Credential Demand

Enrollment Changes by Credential Type1; Sept 2019 vs. Sept 2020



## Application Flight to Size and Selectivity

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



#### 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

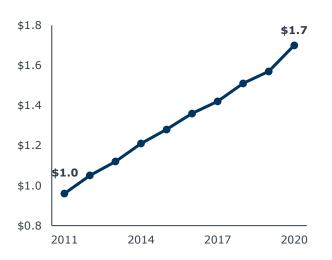
<sup>1)</sup> Large: More than 10,000 total students

<sup>2)</sup> More Selective: admit rate of less than 50% ©2021 by EAB, All Rights Reserved, eab.com

Amid Growing Student Debt, Students and Families Focusing More on Cost

## Student Debt Grew Sharply in 2020, Headed Toward \$2 Trillion

Total U.S. National Student Loan Debt (Trillions)



#### Affordability and Debt Factor into Almost All Families' College Decisions

77%

of families eliminated at least one college from consideration due to cost in 2019-20

## For Some, Affordability Synonymous with "No Debt at All"

39%

of high school students exhibit evidence of loanaverse behavior

# Not Just Affordability, But How We Communicate It

43%

of families find at least one component of financial aid offers difficult to understand

Source: educationdata.org, "Student Loan Debt Statistics", 2020; Sallie Mae and Ipsos, "How America Pays for College 2020"; Boatman, A., Brent J. Evans, and Adela Soliz, 2017, Understanding Loan Aversion in Education: Evidence from High School Seniors, Community College Students, and Adults; EAB, Clearly Communicate Price and Financial Aid; EAB interviews and analysis.

## Alternative Pricing and Aid Strategies Proliferate

New Models Geared More Toward Market Niches Than Affordability At Scale

#### **Tuition Reset**

Lowers published list price, shifting an institution's pricing away from traditional high-price, high-discount model

Market niche: some low- and middleincome students







#### Income-Share Agreement

Graduates repay tuition as a fixed percentage of earnings instead of taking out a traditional loan

Market niche: DACA<sup>1</sup> students, seniors with unmet need









#### **Tuition and Price Guarantee**

Commitment to hold some part of cost of attendance constant while students are enrolled

Market niche: affluent families







#### **Price Match**

Guarantees qualified students the same tuition and fees as designated public institutions (typically flagships)

Market niche: underrepresented students, high-ability students





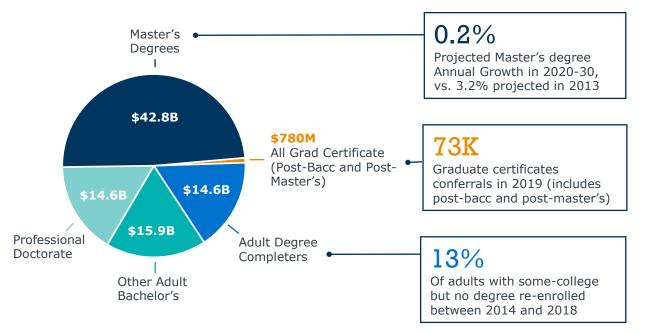


Deferred Action for Childhood Arrivals, which gives some undocumented Americans access to work permits.

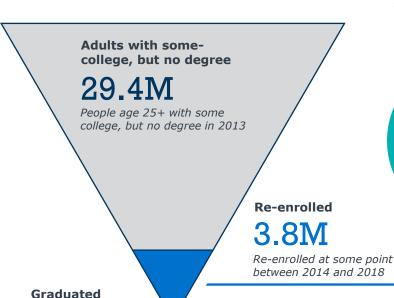
## Sizing the Adult and Grad Ed Revenue Opportunity

#### 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

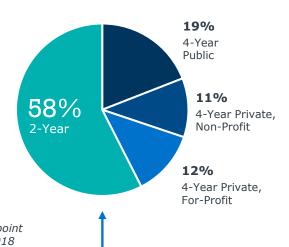






# And of those who re-enroll, most choose a 2-year college

Institution choices of 3.8M degree completion students, 2014-18



Source: Ryu, Mikyung. "Some College, No Degree". National Student Clearinghouse Research Center. 2019; National Student Clearinghouse Research Center. "Some College, No Degree: A 2019 Snapshot for the Nation and 50 States" report and appendix. 2019; EAB interviews and analysis.

940K

## How Degree Completers Choose a Program

16

Program Characteristics Most Important to Degree Completers n=1,010 U.S. degree completion prospects¹ ages 25-54

#### Flexible and Customized



Degree completers seek flexible, customizable degree programs designed with their schedule and lifestyle in mind.

61% Seek a customized plan or roadmap to help them complete their

#### Online



Two-thirds of respondents intend to enroll in a program that allows them to complete some or all courses online.

91% Will likely take courses that are offered online

#### **Enrolls Students Like Them**



Degree completers want evidence that programs and institutions cater to students like them.

67% Seek a program designed "for someone in my situation"

degree

Survey of American adults without a prior bachelor's degree but interest in pursuing one; may include adults with associate's degrees and/or certificates.

Aligning Certificate Strategies with Institutional Goals



**Student Markets** 

Stackable Career-Oriented UG Pathways

**BYU**IDAHO

MBA Readiness Certificate





Funding Model for Mission-Critical Programs







**Emory Continuing Education** 





Fast-Cycle Market Viability Testing

Northwestern
SCHOOL OF
PROFESSIONAL STUDIES

Nimble and Stackable Grad Certificate Modules



#### What Will It Take to Serve the Lifetime Student?

#### Preventing Barriers to Enrollment

#### **Driving Demand for an Expanded Audience**

#### Overcoming Undergrad Debt as a Deterrent



Undergrads borrowing more and taking longer to repay

#### Matching Next Steps to Industry Needs



Need a clear connection between career and next educational step

#### Promoting Alumni Re-Enrollment



Incentives and post-graduation advising needed

#### Radical Membership Models



Subscription pricing and single, forever transactions

#### Redefined Undergrad Value Proposition



Unrealistic to expect bachelor's to sustain lifelong career

# 2

Creating an
Effective
Institutional
Workforce in a
Virtual World



# **Before COVID:** Real Estate and Place Focused

Campus-centric

Physical Attendance Mandatory

Space Intensive Environment

Remote-Work is Rare



# Now: Untethering the Administrative Workforce

Virtual Work Now Possible For Many High-Demand Positions

Coordination Issues Become Critical

Management Challenges

## Toward the Best of Both Worlds on Campus

Emerging Work Regime Maintains New Gains and Keeps the Old

#### **Pre-Pandemic**

- Campus-centric
- Limited employee choice
- Informal, casual communication
- Resistant to change

#### **Post-Vaccine**

- Optimized work modality and location
- Expanded employee choice
- Hybrid communication and interaction
- Sustained and enhanced agility

#### **Pandemic**

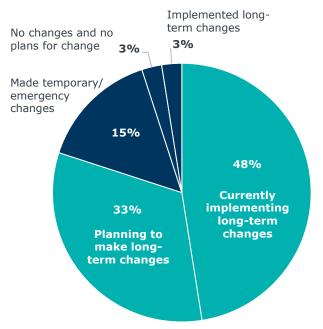
- Location decoupled from work
- Limited employee choice
- Virtual, formal communication
- Proven ability to change

### It's Policy Development Season!

#### Institutions Stay Busy Planning and Implementing Remote Policy Changes

#### **Status of Remote Work Policy Changes**

Responses as of May 2021 n=45



>80%
Institutions either planning or implementing long-term changes

<5%
Institutions did not make any changes and do not plan to change

## Want the Best Talent? Let Staff Work Remotely

#### Four Benefits of Remote Work on Recruiting and Retention



#### **Deeper Applicant Pool**

- Institutions can expand talent pool to non-local workers, including those unable or unwilling to live in university location
- Beneficial to institutional diversity, equity, and inclusion (DEI) goals

69% of Millennials would give up other benefits for a more flexible environment



#### **Lower Turnover**

- Workplaces can accommodate changes in employee lifestyles or locations that would ordinarily force resignation
- Remote employees report higher satisfaction overall

25% lower turnover on average in jobs that offer employees remote work options



#### **Enhanced Productivity**

- Remote and flexible workers work longer hours and are more productive
- Decreased stress and increased satisfaction associated with regular remote work

13% increase in productivity among travel agency workers randomly assigned to work at home



#### **Potential Savings**



\$5,100

non-space related annual savings per employee in a 1,000 person organization that is 40% remote

Source: Buffer State of Remote Work 2019; FlexJobs 2017 State of Telecommuting; Owl Labs 2017 State of Remote Work. Hubstaff; Nicholas Bloom et al., "Does Working at Home Work? Evidence from a Chinese Experiment." Ouarterly Journal of Economics. 2015: Global Workplace Analytics: EAB research and analysis.

## Finally, an Opportunity to Change Campus Space Use 22

Remote Workforces Could Let Universities Do More With Less Space

#### **CBOs See Workplace Potential** for Space Change, But Most Not Yet Committed

In a recent EAB survey of 119 higher education CBOs:

76%

anticipated major changes<sup>1</sup> to remote work policies post-COVID

43%

anticipated major change to space utilization work policies and practices

24%

anticipated major change to campus footprint

#### **Multiple Ways for to Realize Cost** Savings from Work at Home



Short-term: Terminate leases that are no longer needed



Medium-term: Rethink, pause projects in design or construction



Long-term: Consolidate and reconfigure toward hoteling & hot desking spaces

\$300

cost per square foot of avoided new construction \$1900

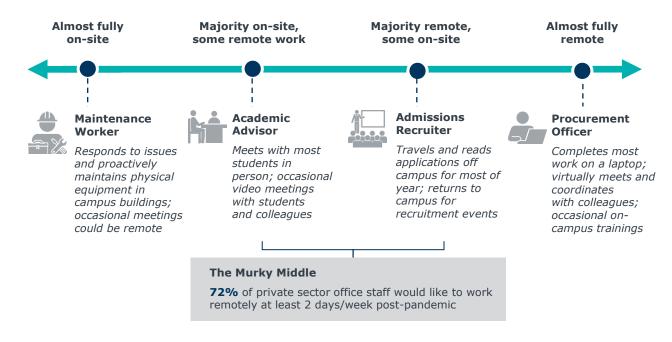
space cost savings per employee annually in a 40% remote office

<sup>&</sup>lt;sup>1</sup>Responded 4 or 5 on scale of 1 (no change) to 5 (radical change).

## Hybrid Means Not All or Nothing

The Future Campus is Not Fully On-Site or Fully Remote, But In-Between

#### Sample Hybrid Work Scenarios



#### Remote Work Survey Results on Past and Future Work Arrangements

**Pre-Pandemic Work Arrangement Estimates** 

**Post-Pandemic Work Arrangement Estimates** 

Fully on-campus



6%

Hybrid



23%

7%

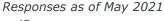
Fully remote

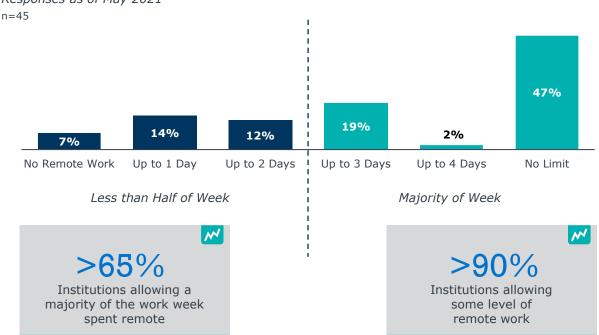


~1% 8%

Fully remote

#### **Anticipated Weekly Remote Work Limits**



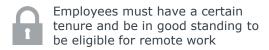


## Establish a Goal-Driven Remote Work Policy

Update Outdated Rules to Promote Flexibility, Support Institutional Strategy

#### **Typical Pre-COVID Policies**

Transactional, Risk Mitigation Approach



The working hours for remote employees must stay the same as those for on-site staff

Employee and manager must cosign an agreement and receive approval from Dean or VP

Agreement often has a time limit and must be reviewed and renewed periodically

Remote Work Policies

#### **Post-COVID Policy Tenets**

Strategic, Trust-Based Approach

Pre-approve remote work option at time of job posting to increase talent pool

Allow flexibility in work hours and location whenever feasible to retain staff

Transition from remote work as a privilege to an option for most employees

Eliminate time limits on remote work approval

#### University of Bradford's "New Ways of Working" Principles



66

*Trust-based.* That colleagues are trusted, and in turn take personal responsibility...to deliver the highest standards of performance and productivity.

A service-led flexible approach. That we embrace a blended approach to service delivery by determining which tasks are best delivered on campus and which can be achieved remotely.

Team connection days. That each team has an agreed day where all members are in the office to meet and connect face to face.

*Visibility and accessibility.* That there is a representative from each team in the office every day to ensure visibility and accessibility for anyone else working on campus that may visit the department.

Supporting personal choice. That we recognize, respect and support staff working in a way that balances and enables their work requirements with their personal preferences.

Maximizing technology. That we take full advantage of the technology available to us by equipping ourselves with the skills to be visible, accessible and fully efficient in our roles.

## Keeping the Guidelines Simple



# Fairhope University<sup>1</sup> Pilots Simple Flexible Work Requirements in the IT Organization

If the employee can...



**Productivity** 

They can work from home with managerial approval.



#### **Advantages of High-Level Work Guidelines**

Service

Quality

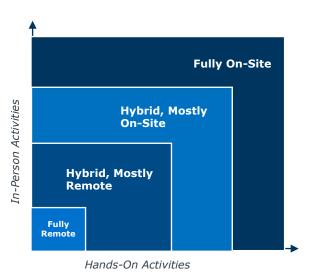
- · Empower autonomous managerial decision making
- Shield Human Resources from answering numerous "what-if" scenarios
- · Advance equity in flex work consideration without micromanaging

Collaboratively

### Service Needs Determine Remoteness

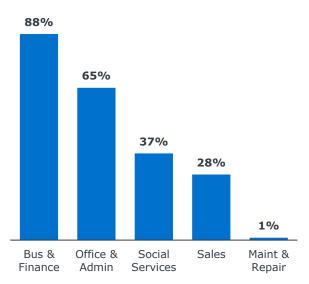
Employee Choice is Important, but Quality of Service Comes First

## Level of Hybridity Depends on "Who and What" Assessment...



# ...Leading to Significant Variation in Hybridity of Roles

Jobs in Category Suitable for Work at Home



#### **Remote Work Increase Estimates by Staff Department**

#### **MINIMAL INCREASE**



**Facilities** 



Academic Advising

#### **MODEST INCREASE**



**HR/Legal** 



**Advancement** 

#### SIGNIFICANT INCREASE





IT

**Finance** 



**Procurement** 

# 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

# Gen Z Daily Lives Shaped by an Advanced Digital Landscape



One-stop-shop information access, whenever and wherever



Information filtered through algorithms



Online experience personalized through ad tracking



Media has always been social, and platforms have distinct purposes



Content has 8-seconds to capture attention

#### Feeling the Effects

#### **Students Now Need and Expect:**



More directive and personalized ways to navigate resources



24/7 service and centralized information hubs

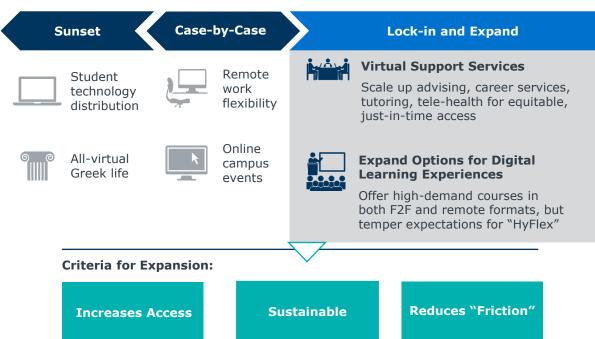


Online conduct and media literacy training



Leadership to address online polarization, conduct issues and greater range of flashpoints

#### Strategically Scale or Sunset Virtual Services Based on Student Needs



#### Gen Z Flocks to Virtual Learning



60B views on #LearnonTikTok in 2020



Education 5th most popular podcast genre globally in 2020



"Learn how" searches peaked early in pandemic1 on YouTube

#### The Student Voice

**But Not Necessarily from Your** Institution

Analysis Methodology:

130+ Student newspapers from around the country

84%

Of articles reported negative reactions toward virtual learning in 2020

2x

Students more likely to object to **poor** quality of online instruction vs. online modality itself

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 Peerto-Peer Networks



Problem-Based Group Work at the Core



Integrated
Data on
Student
Progress

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

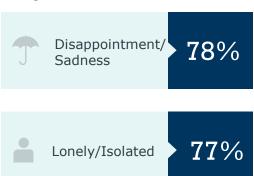
Both Clinical and Non-Clinical Solutions Essential

Integrated Wellness Environments for Students, Faculty, and Staff

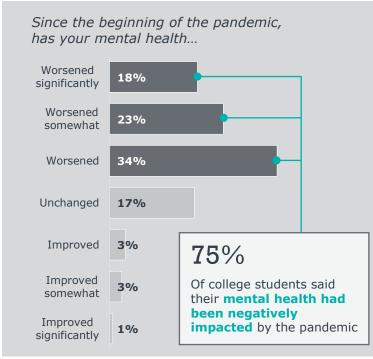
### But Early Data Indicates Widespread Impact on Mental Health and Wellness

## No One Immune to Emotional Impacts of COVID

Share of students surveyed who reported feeling...







### 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-vear Public U.S University

The 'Well-Being' Umbrella

Mental Health

Physical Health

Sense of Community Spiritual Wellness

Life Purpose

Career

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

**99** 

### A New Competitive Recruitment Advantage

It's more and more common to hear parents and families asking about the availability of mental health and well-being resources on campus during the admissions process.

Dean of Students Private College Well-Being Expectations Growing Among Families and Prospective Students...

Of parents have or tried to use telehealth for their child's mental health needs in the last 12 months

Of prospective students said that mental health services are a very important factor when selecting where they will go to school

### ...and Current Students

Of first year students believe they will likely seek personal counseling while in college according to a 2019 survey

## Teaching Wellness through Academic Disciplines



### Georgetown's Engelhard Project

Faculty link academic course content to health and well-being topics through readings, presentations, and reflective writing assignments.

### **Three Elements of Curricular Infusion**



Targeted readings or writing assignments that link course content with infusion topic



In-class discussions and/or presentations from campus resource professionals



Community partnerships that encourage students to reflect on lived experience



Georgetown University

DEPARTMENT	COURSE TITLE	WELL-BEING TOPIC
Anthropology	Disability and Culture	Mental Health, Relationships
Economics	Healthcare Systems Economics	Stress and Coping Skills
German	Witches	Societal Stigma, Mental Health
Mathematics	Introduction to Math Modeling	Healthy Relationships With Food and Exercise
Physics	Dynamic Processes in Biological Physics	Biology of Depression
Philosophy	Introduction to Philosophy	Human Flourishing
Psychology	Cultural Psychology	Contemplative Practices for Well-Being

## A Mindset to Overcome Early Hurdles

Psychosocial Intervention to Promote First-Year Equity

### Orientation Exercises Inoculate Students Against First-Term Shocks





- · Letters from other students
- Online modules about the ability to gain new skills and overcome challenges

## Reflect o

## Reflect on Personal Story of Overcoming Obstacles

- Essay on past struggles that the student has overcome
- Write a letter to the student's past self about resilience

## Amherst College





### Give Advice on Overcoming Challenges

- Record a video reflecting on what the student learned
- Write to a suggested high school student summarizing information from exercise

50%

Reduction in the gap in 12+ credit completion between "disadvantaged and advantaged1" 50%

Reduction in the GPA gap between African American and white graduates<sup>2</sup>

Disadvantaged students defined as African American, Hispanic, and first-generation studenets (Tough, 2014)

<sup>2)</sup> Replication of growth mindset intervention at elite, northeastern private university

# 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

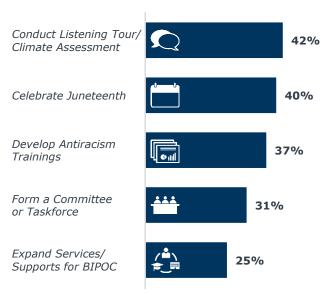
Diverse Junior Instructors and Staff More Likely to Be Laid Off

Anti-Racism Statements Promise Change, But Little Commitment

Institutional Efforts Center on Incremental, Low-Resource Commitments

### **Commitments in Our Comfort Zone**

Percentage of Statements with Action Items that Include Commitment to:





Duke University Mobilizes Three Levels of Coordinated Work



Broad Antiracism Commitments Contextualized and Operationalized Across Multiple Layers of the Institution

10

Central antiracism commitments

### Institution

President, Board of Trustees, Cabinet, Overseeing Committee set institutionwide vision, commitments, and goals

12+

Action plans among individual colleges, schools, and divisions

### Divisions

VPs contextualize institutionwide commitments to align with division-wide goals

39+

Programs and actions mapped out to meet goals

### **Departments**

Individual offices, departments held accountable for meeting goals, gathering data, implementing actions

## Institutional Commitment

"Recognizing that BIPOC faculty must have equitable opportunities for hiring and advancement, we will initiate programs to further the excellence of our faculty."

## Office of Faculty Advancement

"With data from departments, we will build a robust **faculty diversity dashboard** that will publicly track faculty diversity and hiring efforts." Recruitment and Retention Practices Can Have an Outsized Impact

### **Effective Efforts To Diversify are...**



Department-Led



Embedded in Practices



Process-Focused





Reflect needs of department and driven by faculty ownership and investment Not dependent on impermanent initiative resources or funding Reexamine policies and processes to ensure equity and inclusion



**What Departments Should Focus On** 



Upstream Recruitment



Equitable Hiring

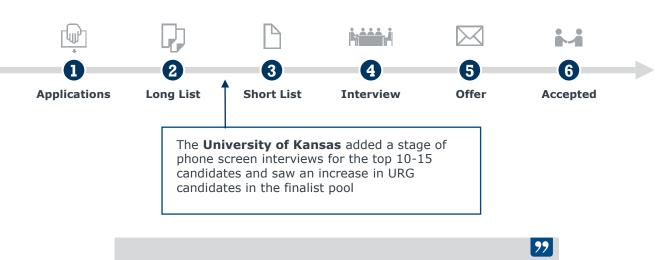


Proactive Onboarding

## **Expand Interview Opportunities**

47

Increase the Likelihood That Faculty Interact with Diverse Candidates



"When we added Skype screeners, people that had been 7<sup>th</sup> or 10<sup>th</sup> beforehand started getting selected for on-campus interviews, and the department just fixed itself."

Department Chair

### From Statements to Substantive Action

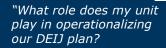


### EAB's DEIJ Plan Design Lab



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

"What are the most important metrics for us to



track over time?"

### **DEIJ Institutional Plan Assessment**

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

### **DEIJ Institutional Metrics Selection Workshop**

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

### **DEIJ Divisional Alignment Exercise**

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



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