Unprecedented Enrollment Uncertainty

In the midst of declining enrollment, changing student demographics, budget funding pressures, negative perceptions of cost and student loan debt, COVID-19 has challenged higher education institutions to consider their operating models, business continuity plans, and a varying level of preparedness for a digital shift in education. The impact, long or short, may force some institutions to close, and many will likely need to undergo major shifts with strategic enrollment management in order to remain viable. Institutions should respond to the immediate student needs while swiftly making plans to recover from an adjusted model post-COVID-19 to help them thrive in a world that will likely change many cultural norms.

Institutions should respond for the immediate need to shift academic operations virtually while continuing to prepare for an uncertain future class.

Educate

• Stand up virtual education capabilities and train faculty on technology resources and pedagogical practices
• Evaluate virtual and "in-place" alternatives for hands-on coursework

Recruit

• Shift recruiter efforts to virtual outreach, and place more emphasis on more personalized communications to prospects and applicants
• Redesign admission review processes for applicants lacking standardized test scores
• Evaluate admisable applicants and consider additional admits
• Consider targeted additional financial support or aid strategies for out-of-state and international populations, families heavily affected financially by crisis, or families considering lower-cost on-line universities
• Prepare for cohort more heavily weighted toward local populations
• Pursue transfers, particularly former admits who chose to go out of state
• Prepare for potential influx in credit evaluation volume

Operate

• Forecast short-term and lifetime net tuition impact of fall 2021 cohort
• Design "what-if" tuition or aid contingency differentials for on-campus versus virtual fall 2020/spring 2021
• Estimate cost of new or modified services designed to support students virtually
• Evaluate costs of additive technology solutions and/or bandwidth to support online learning
• Evaluate the financial impact of refunds on operations, global campuses, procurement, and redraws

Retain

• Migrate academic support services to online platforms
• Offer remote wellness and mental health services as possible; develop individualized solutions for students with most acute needs
• Utilize login and participation data from virtual courses to evaluate engagement and identify at-risk students
• Design tuition and aid scenarios to assist families impacted by crisis and/or considering transferring to online institution
• Prepare for virtual new student orientation for incoming students

Recover

As institutions stabilize for the near term, plans for the short term must be developed with consideration of potential long-term enrollment impacts of COVID-19.

Educate

• Evaluate technology needs, student progress, and student and faculty feedback to continuously improve virtual experience
• Consider changes to pedagogy and/or academic program offerings in response to emerging student and market needs
• Work closely with key employment partners and organizations known for thriving virtual workplaces to offer internship, employment, and experiential opportunities
• Closely monitor potential shifts in students’ preferred courses of study and be prepared to shift academic resources to meet demand

Recruit

• Define differentiating qualities of your institution’s virtual experience
• Develop enrollment marketing campaigns around your institutions’ “new” points of strength
• Evaluate new prospective populations to engage and recruit
• Set realistic enrollment goals based on available data... but continue to pursue traditional pipeline under assumption that crisis will eventually moderate

Operate

• Operate as if crisis period will be the status quo for the foreseeable future: Continuously improve and resist urge that crisis “just goes away”
• Continuously map various future scenarios and have “shovel-ready” implementation plans prepared
• Re-evaluate the viability of programs and services not meeting mission or financial thresholds
• Align planning and budget strategies to reflect revenue and operational changes

Retain

• Evaluate academic and wellness support services in person and virtually to best fit students’ needs and preferences
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Educate

• Prepare to provide more courses virtually, including mixed modalities
• Restructure coursework and curricula to offer more alternatives to traditional four-year degree
• Utilize data and analytics to offer more personalized instruction, both in person and virtually
• Identify areas of growth with distance learning based on the proposed rules by the US Department of Education

Recruit

• More clearly articulate value of holistic campus experience
• Be prepared for continued cost-sensitivity and competition from peer institutions
• Close the innovation gap (shaping an academic experience from experiential aspects of “traditional college”)

Operate

• Use crisis experience to help make more informed decisions about investments in “traditional” versus virtual offerings
• Prepare for continued reduction in student willingness to pay and resultant net tuition revenue
• Reimagine physical space and faculty needs on campus
• As crisis finally passes, refresh business continuity plans to ensure sustained enrollment and operational capabilities in future

Retain

• Continue to offer academic and wellness support services in person and virtually to best fit students’ needs and preferences
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