



Cushion the Fall Off of the Enrollment Cliff



The Council of
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Under
the Big Tent

2024 Presidents Institute
Independent Higher Education in a Democratic Society

The Diplomat Beach Resort | January 4–7, 2024

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Presenters

Eric A. Groves, Senior Vice President, Ruffalo Noel Levitz

Bob Brower, President, Point Loma Nazarene University (CA)



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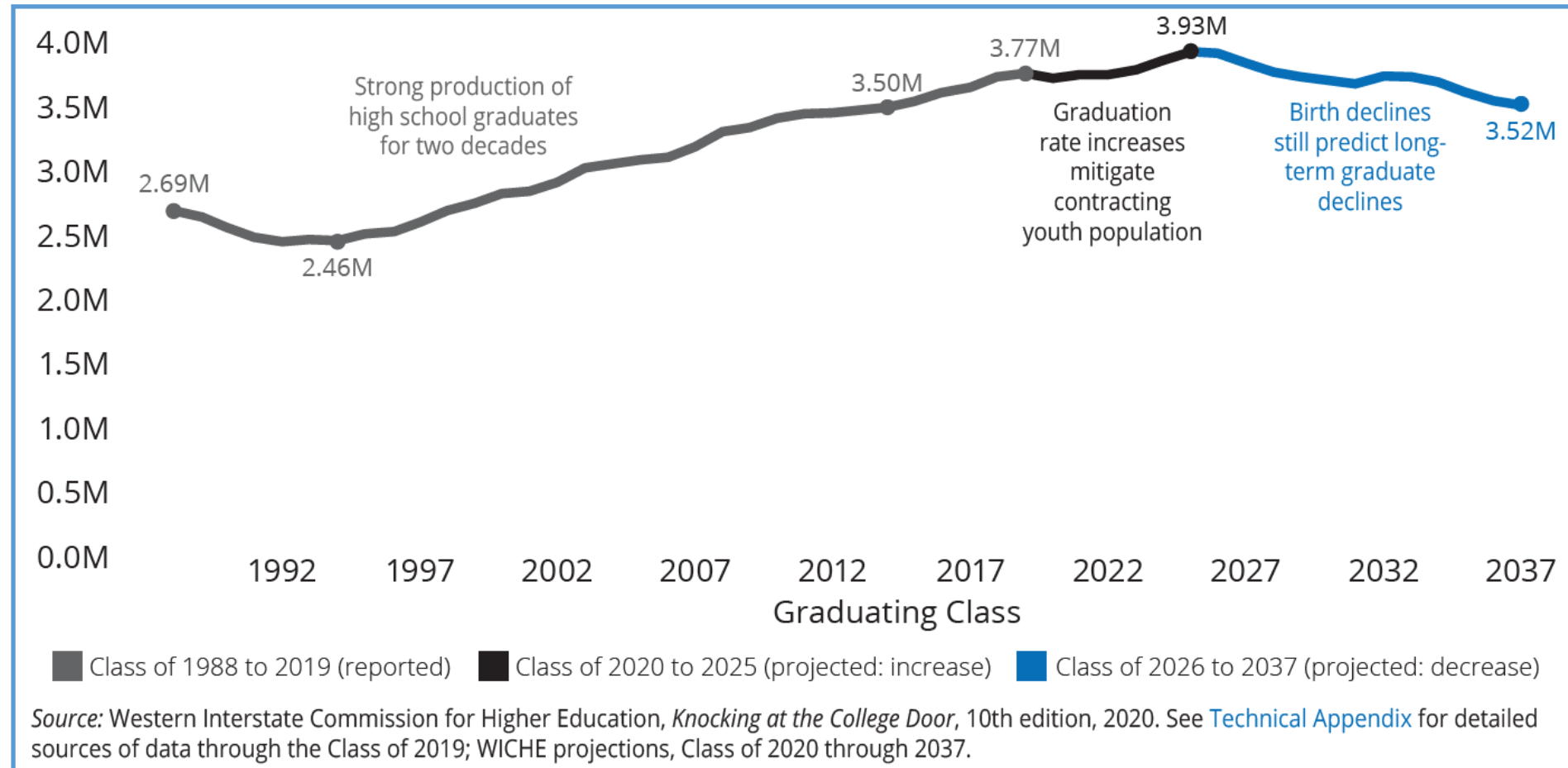
Agenda

- The Enrollment Landscape
- Response to Current Market Conditions
- Presidential Spotlight: Bob Brower, President at Point Loma Nazarene University
12 years of Strategic Enrollment Planning (SEP)

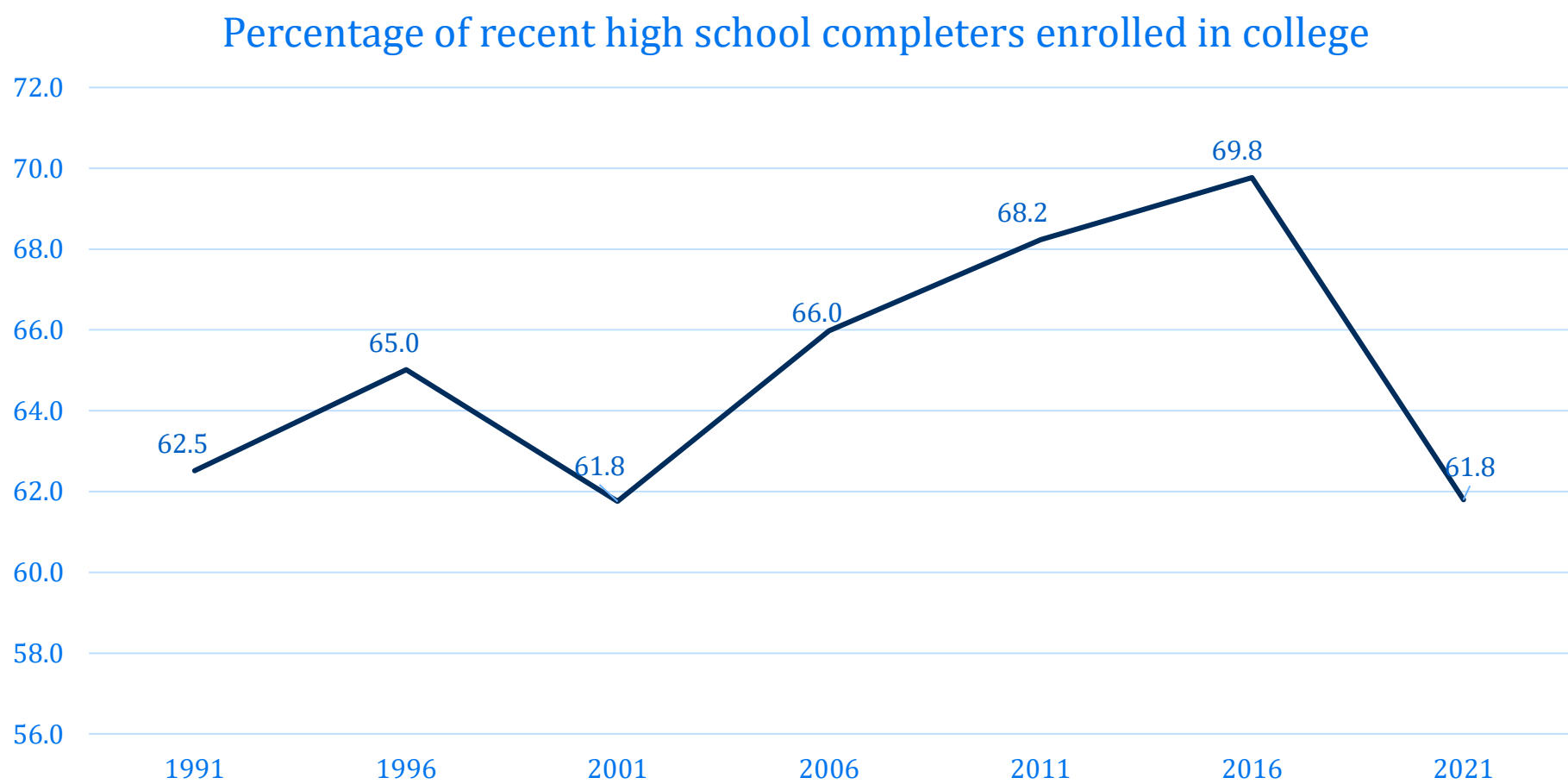


Projected U.S. High School Graduates

Figure 1. Slowing Growth in Number of U.S. High School Graduates, then Decline (U.S. Total High School Graduates)

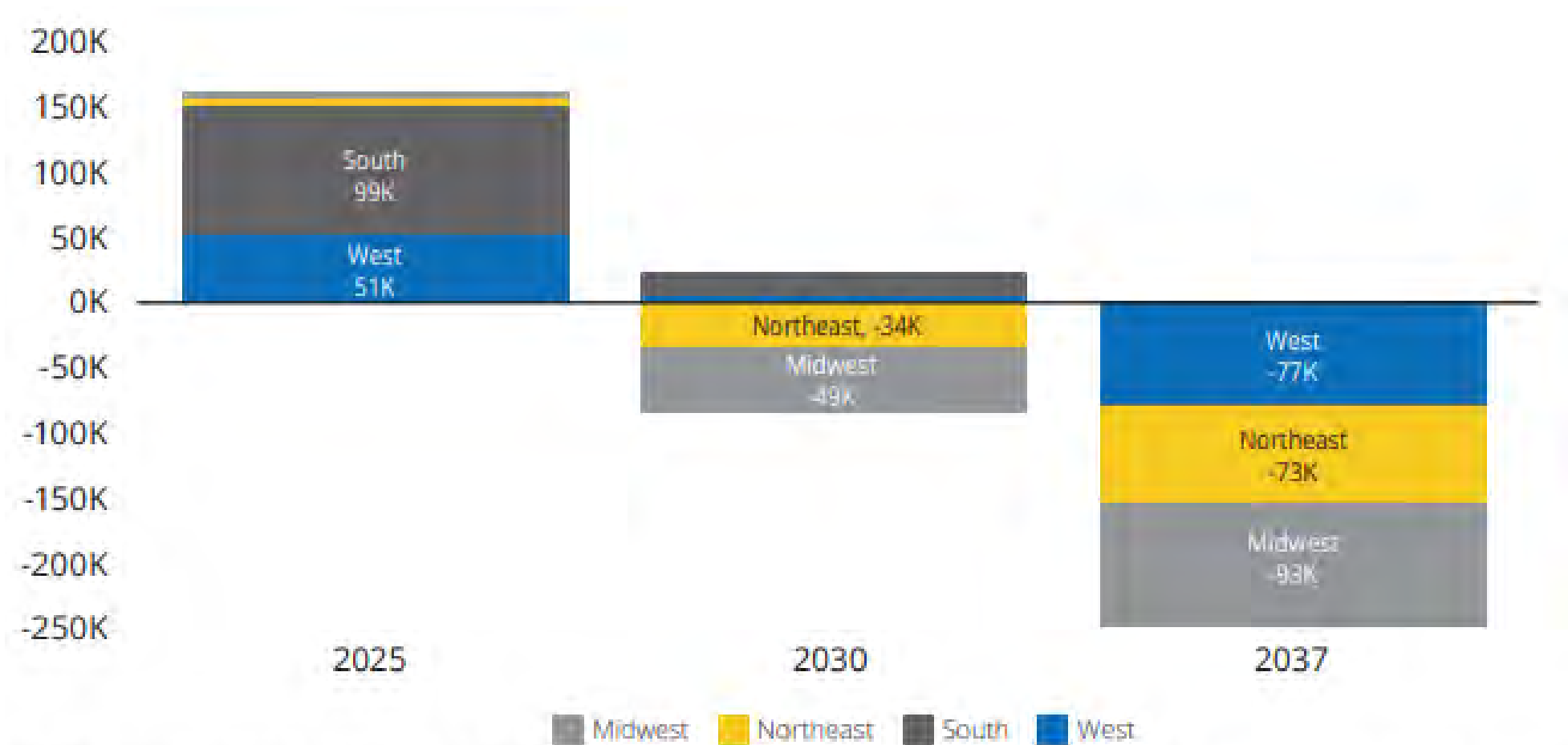


College Participation Rates had been a Key Growth Driver



Source: NCES, Digest 2022 Table 302.20

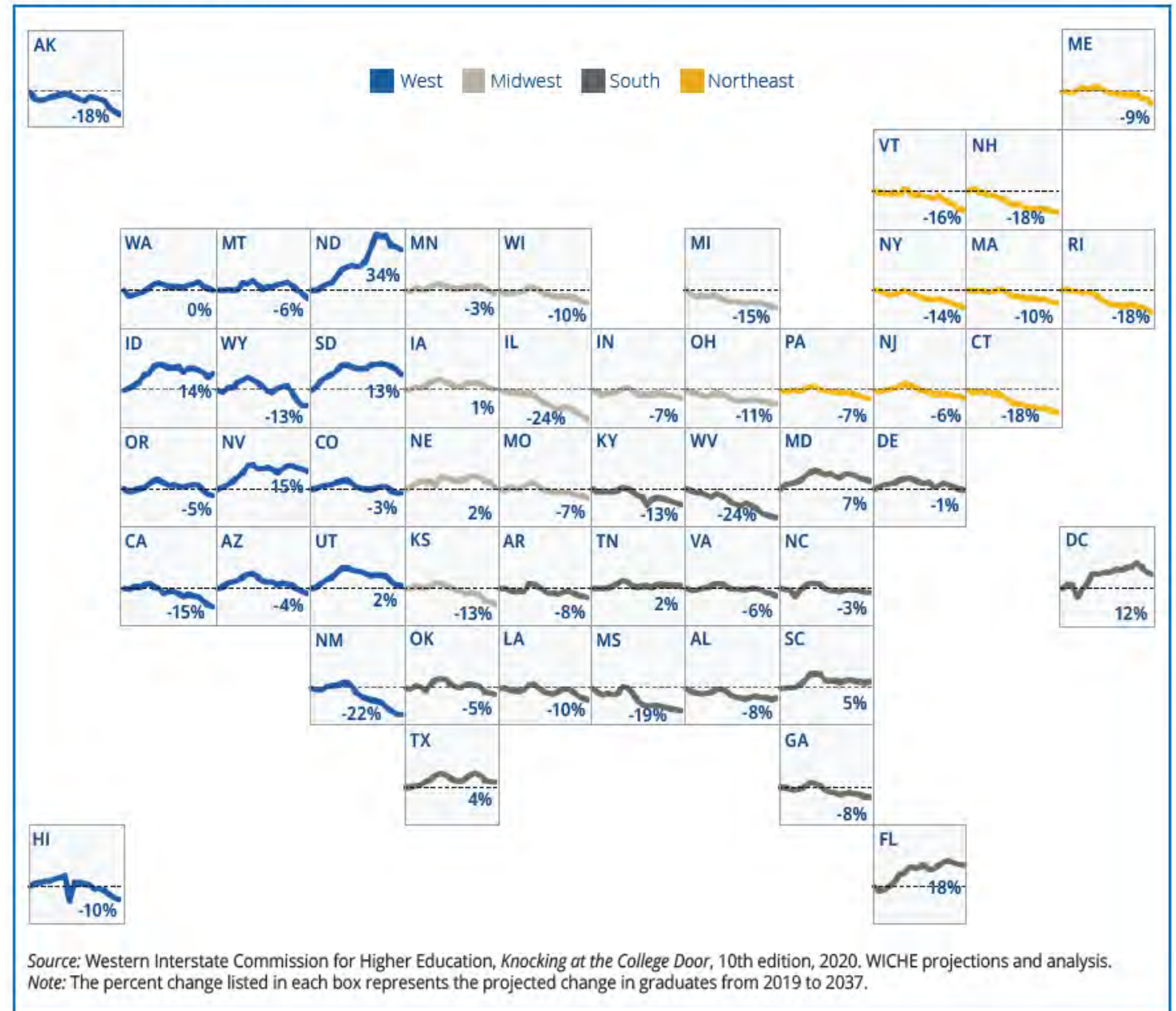
Regional Contribution to National Increases or Decreases



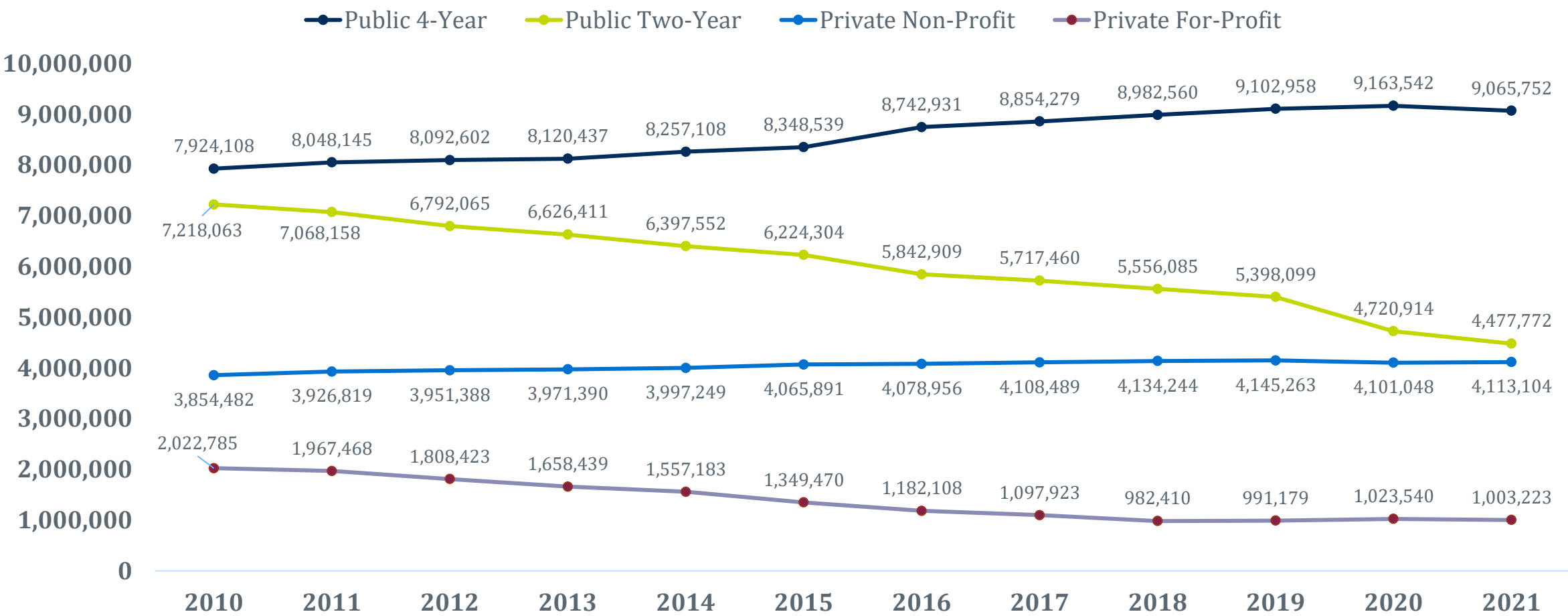
Source: Western Interstate Commission for Higher Education, *Knocking at the College Door*, 10th edition, 2020. WICHE projections and analysis.
Note: See Figure 2a for states included in each region.

State Projections Through 2037

Figure 2b. State-by-State Projected Percent Change from Class of 2019 to 2037, Grand Total of Public & Private Schools



Recent Declines by Sector are Related to Long Term Trends



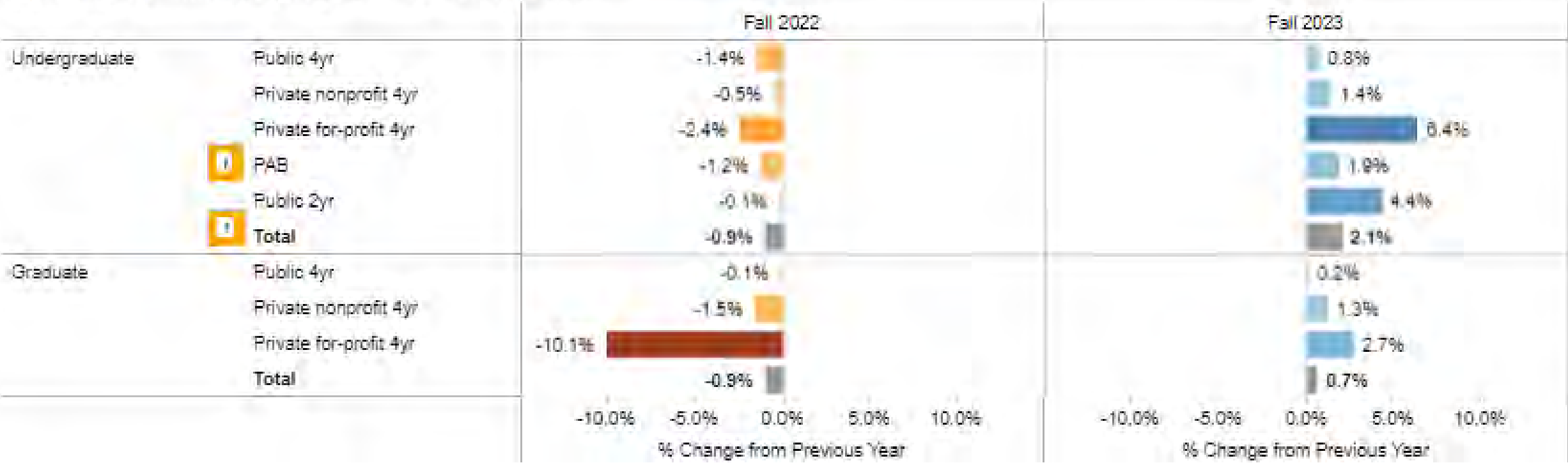
Source: [Digest of Educational Statistics: Total fall enrollment in degree-granting postsecondary institutions, by level and control of institution, attendance status, and sex of student: Selected years, 1970 through 2021](#)

Fall Undergraduate 2023 Total Enrollment Up 2.1%

Following 12 years of enrollment declines

Graduate Enrollment up .7%

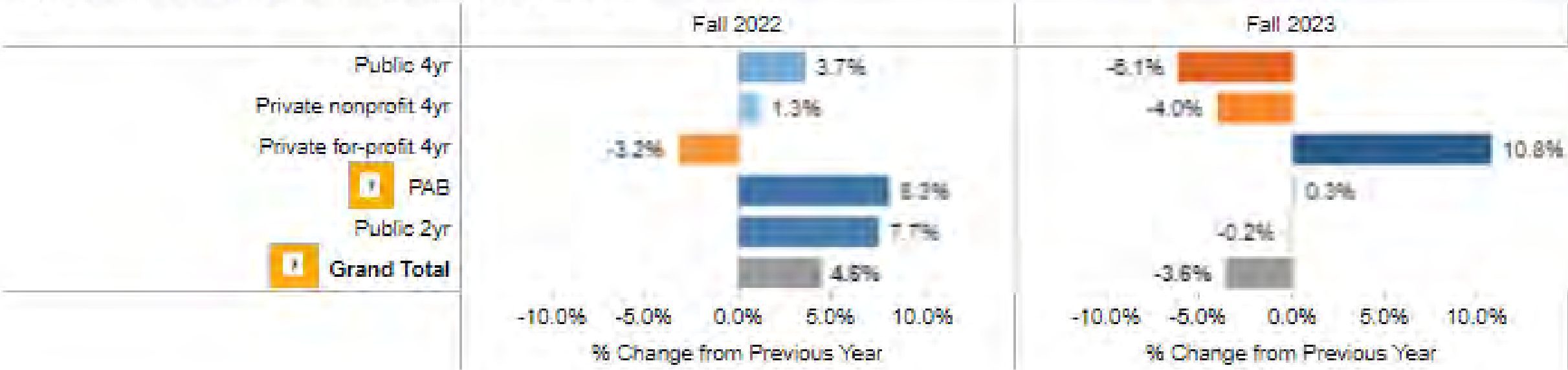
Figure 1.2 Enrollment Changes by Award Level and Sector



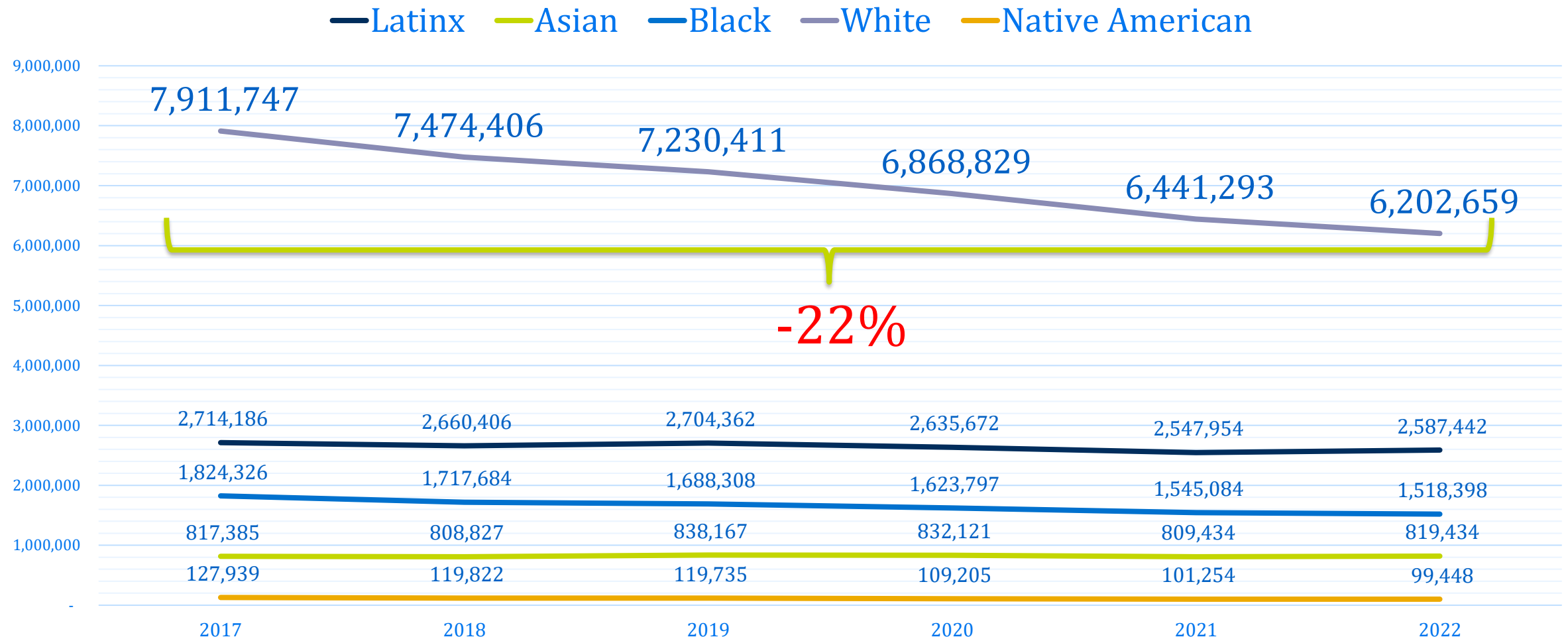
Undergraduate New Student Enrollment

Dropped at Both 4-Year Publics and 4-Year Private Non-Profits

Figure 3.2 Freshman Enrollment Changes by Sector

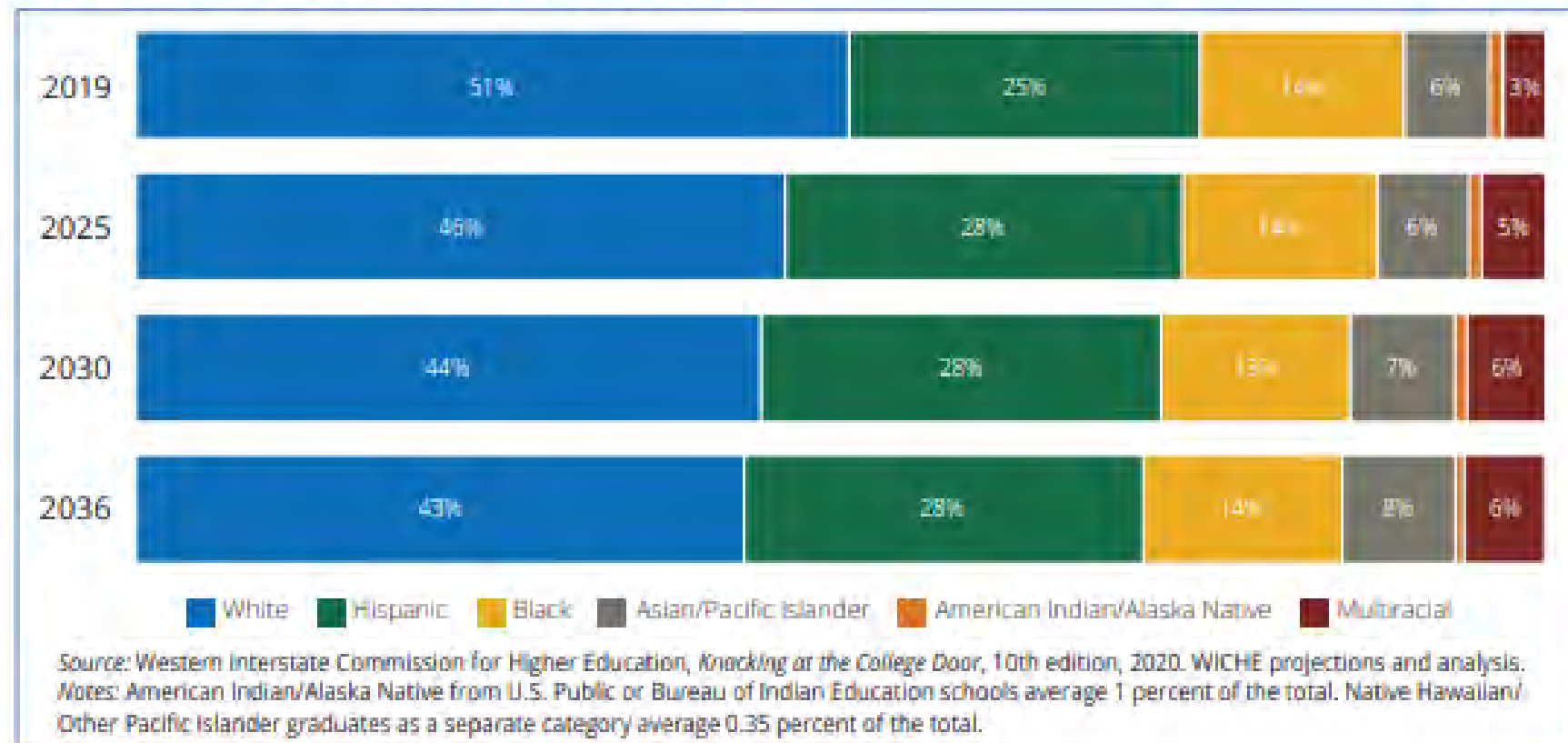


Fall Undergraduate Enrollment by Race/Ethnicity



Like the Rest of Society, Higher Education Enrollment is Becoming More Diverse

Figure 2. U.S. Public High School Graduates, by Race/Ethnicity, Class of 2019 (reported) and Classes of 2025, 2030, and 2036 (projected)

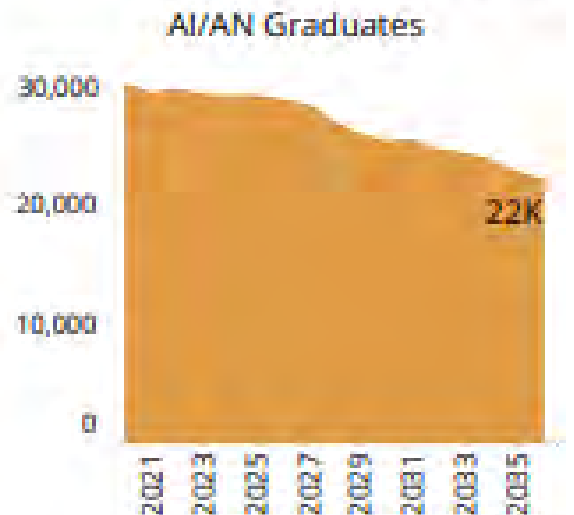
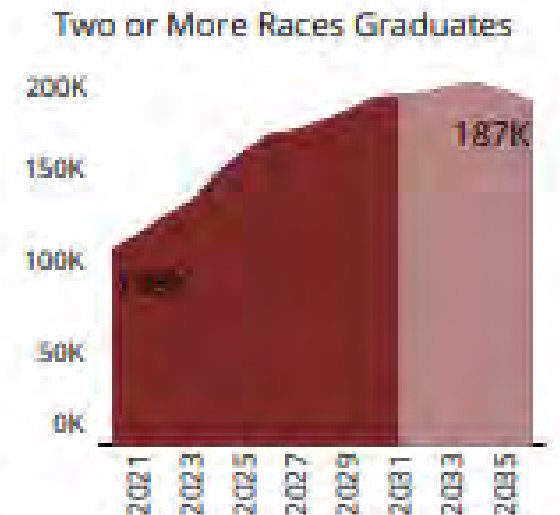
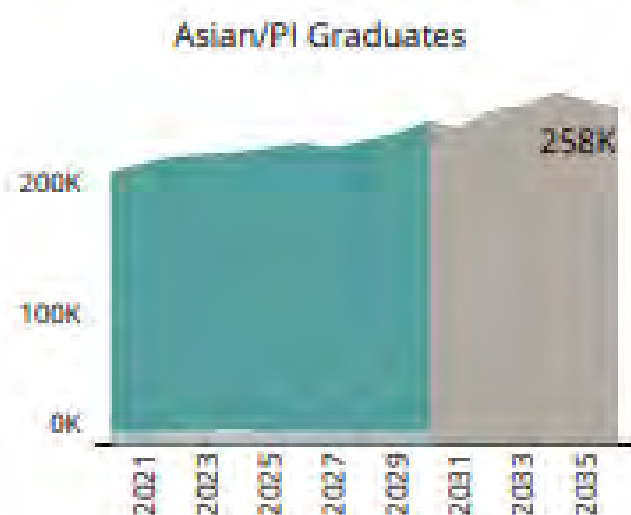
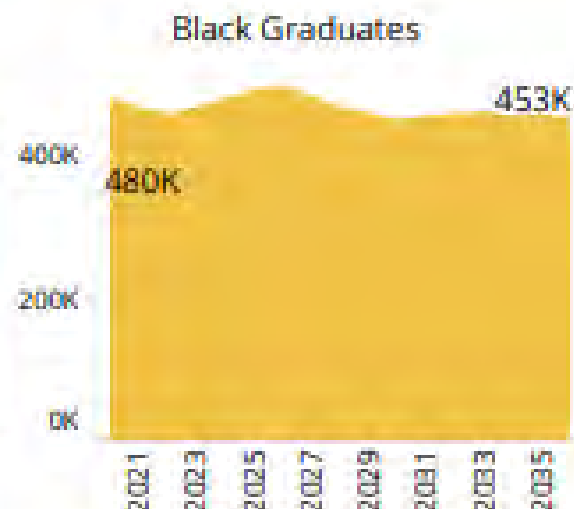
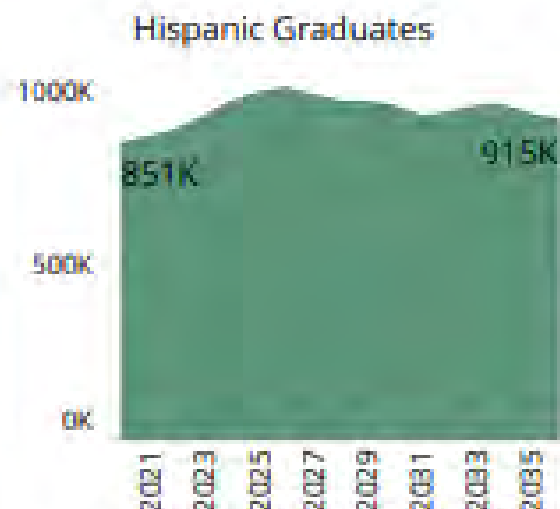
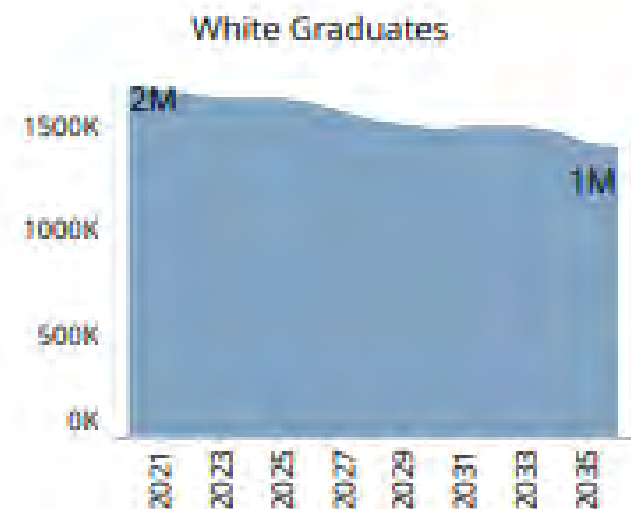


United States Public High School Graduates by Race & Ethnicity

Projections for Class of 2020 to 2036

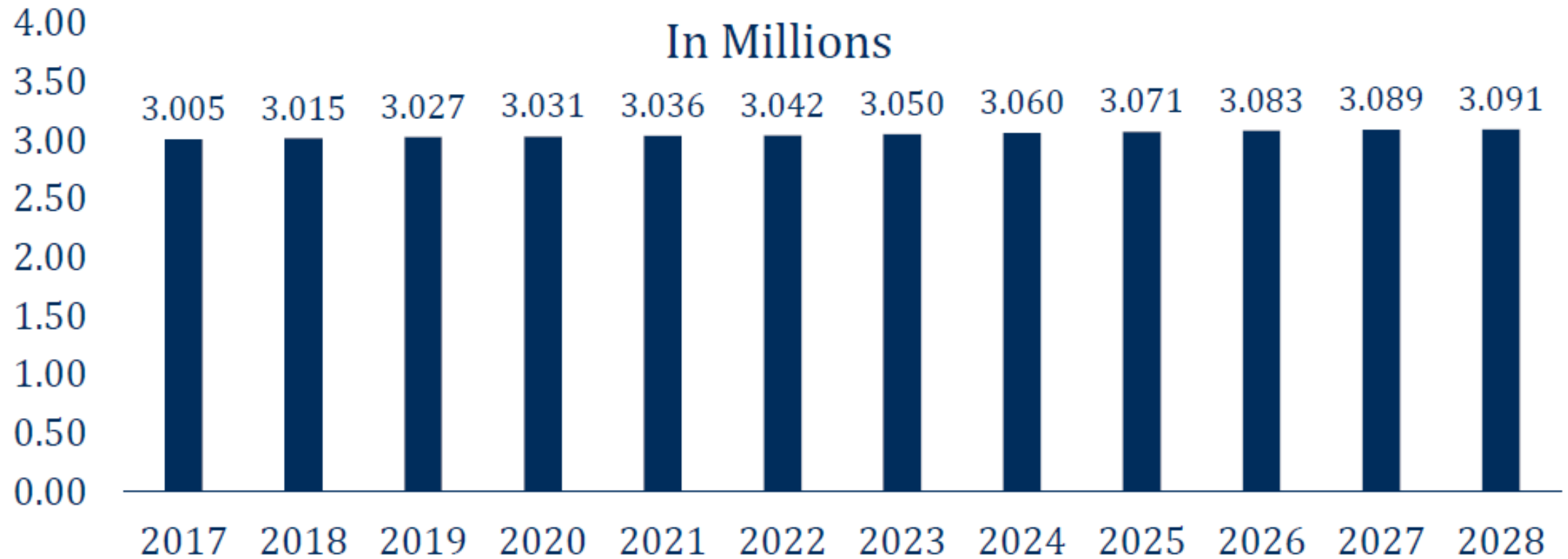


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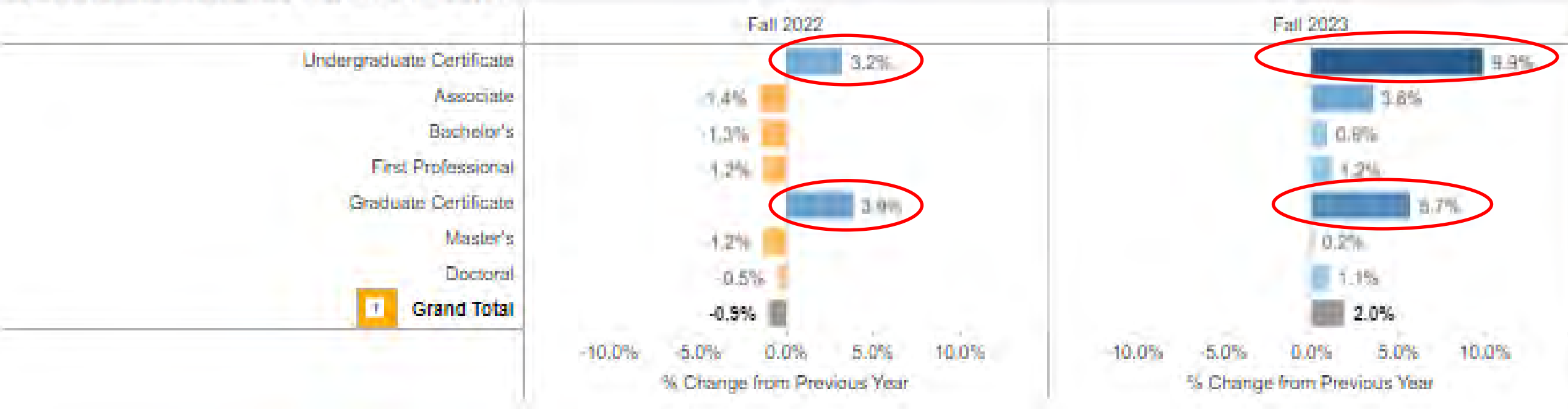
Graduate Enrollment is Expected to be Flat or Increase Slightly from 2022 to 2028



Source: US Department of Education, Institute of Education Sciences, National Center for Education Statistics, 2018 Digest of Educational Statistics: Table 303.80

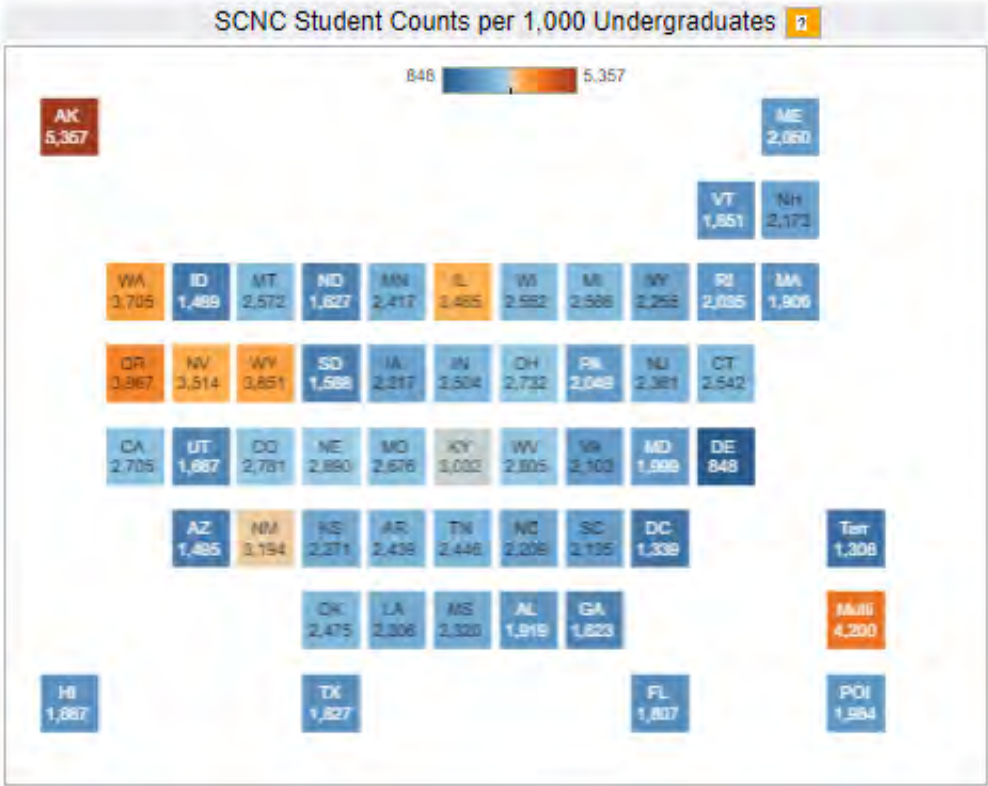
Fall 2023: Undergraduate and Graduate Certificates Produced Significant Growth

Figure 1.1 Enrollment Changes by Credential Type



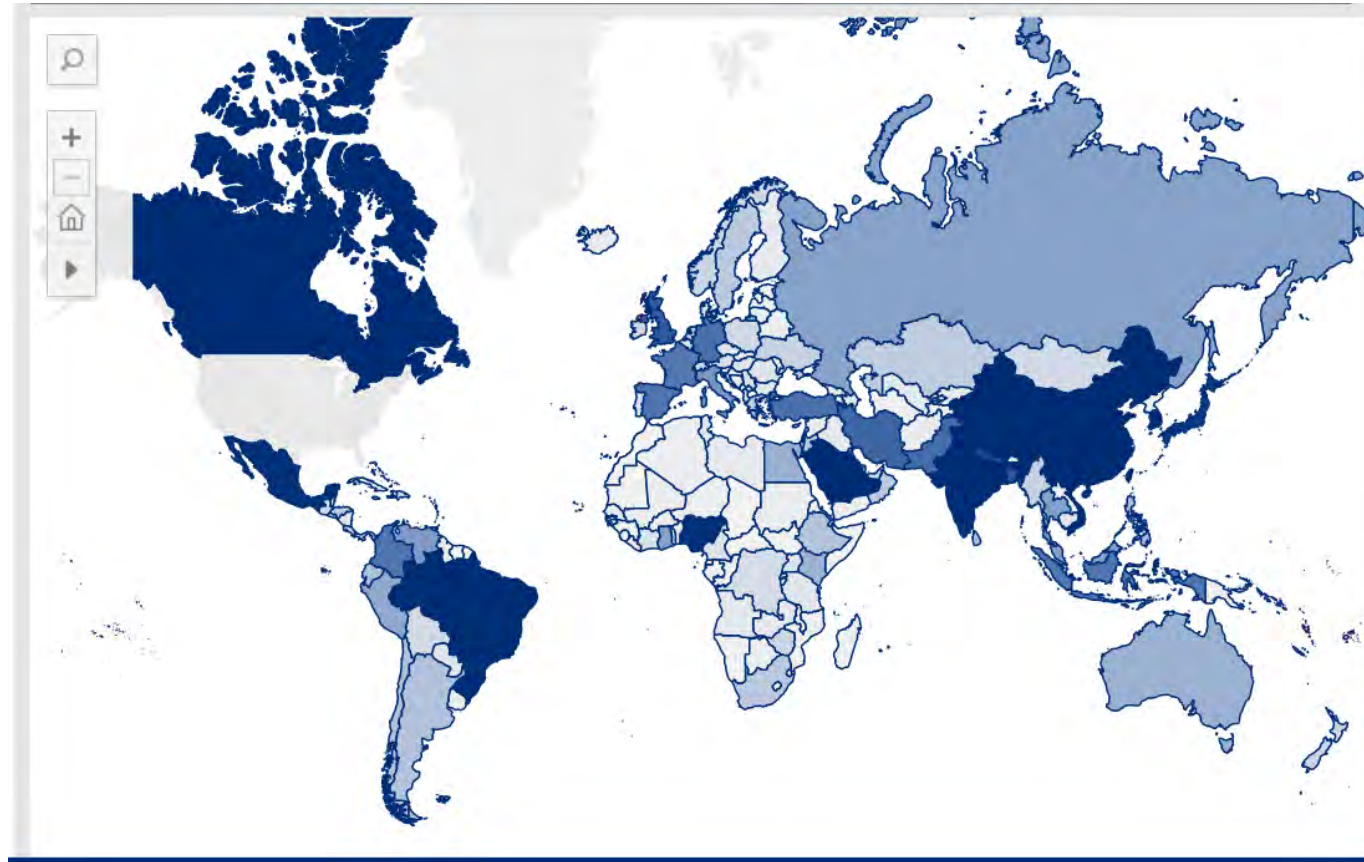
40.5 million students nationally have some college, but no credential

Some College No Credential Population by Current Age					
	20 to 24	25 to 34	35 to 44	45 to 64	Over 65
Count	2.17M	11.15M	10.24M	10.73M	4.63M
Share	5.4%	27.5%	25.3%	26.5%	11.4%
*Details do not total to 100% due to missing age not shown					



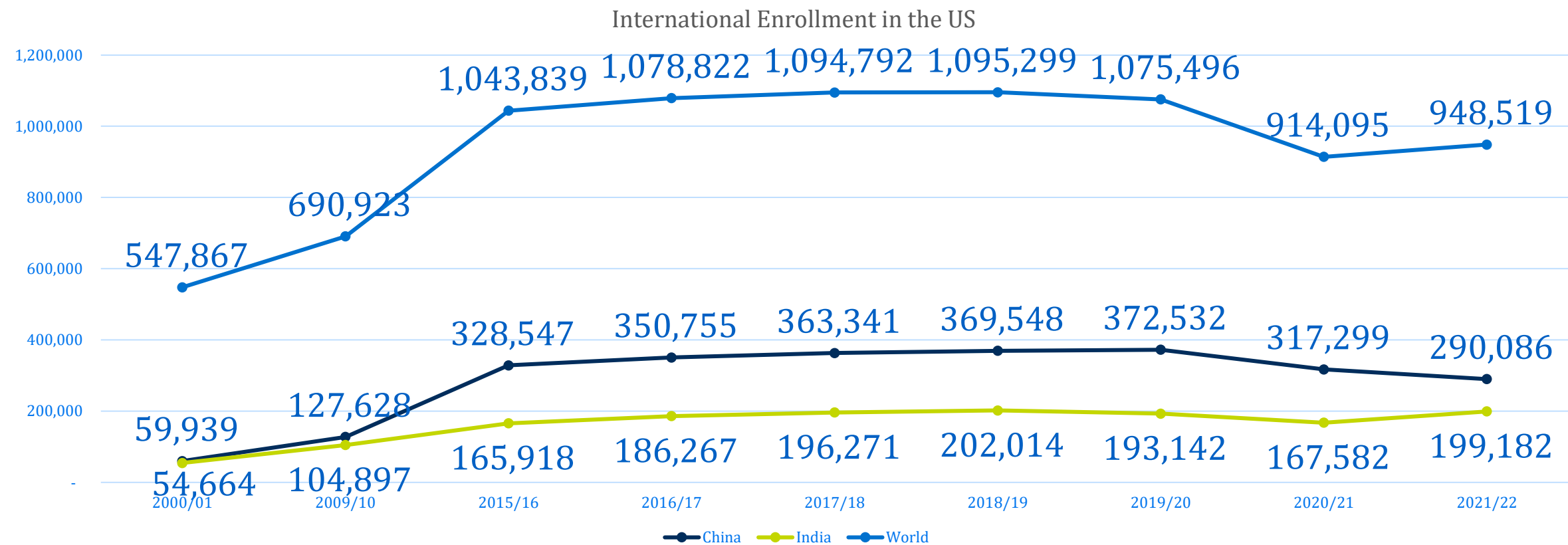
International Enrollment in the US

948,519 International Students in the US in 2022



International Enrollment in US Institutions

Growth in India has offset declines in China



International Enrollment in the US

Largest Contributors in 2021/22

	2021/22	% Change
Canada	27,013	7.4%
Mexico	14,500	11.7%
Chile	2,750	23.5%
Brazil	14,897	6.4%
Nigeria	14,438	12.3%
Saudi Arabia	18,206	-17.0%
India	199,182	18.9%
China	290,086	-8.6%
United Kingdom	10,292	28.2%
Norway	1,633	29.1%
South Africa	2,375	14.2%

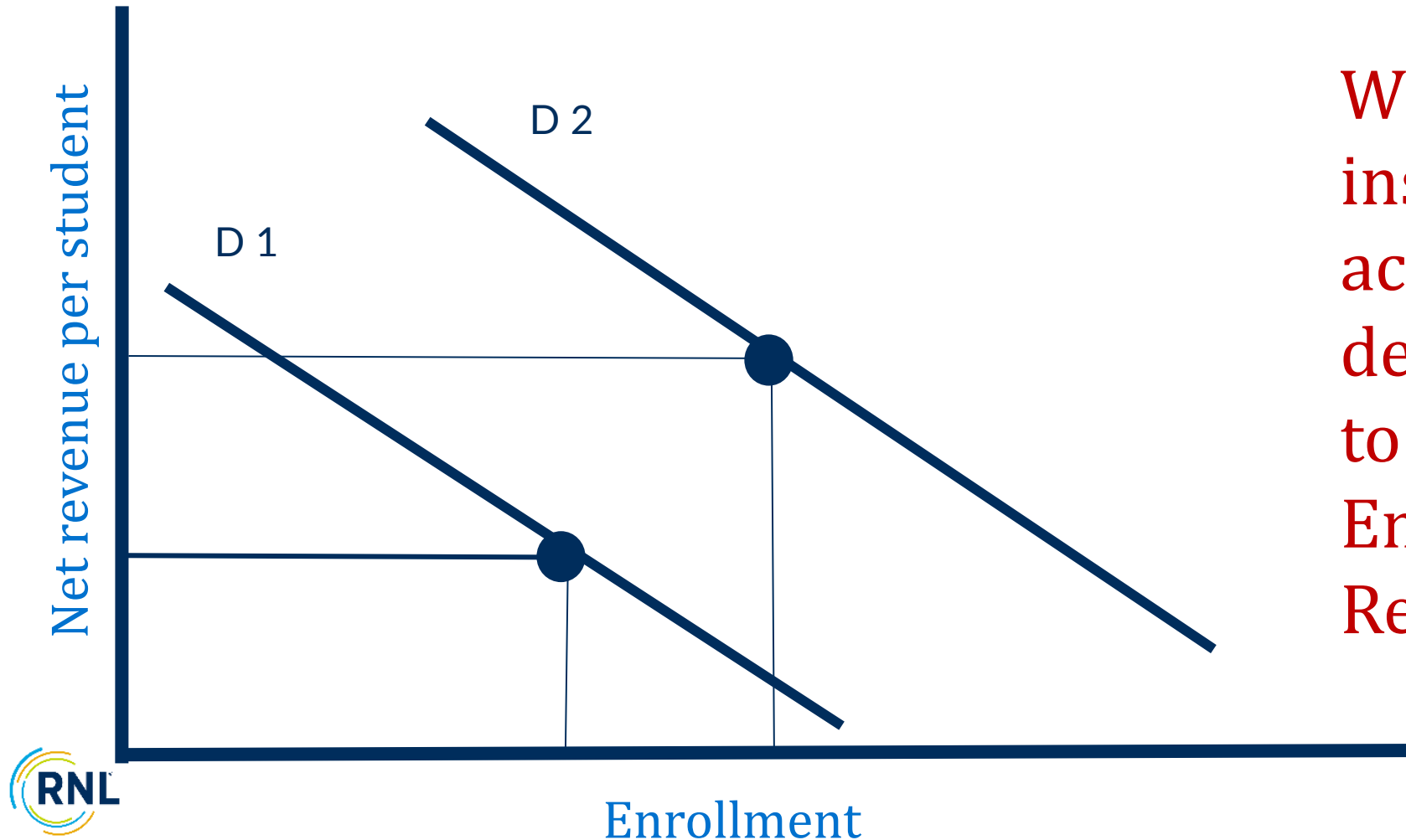
Australia	3,892	7.4%
Pakistan	8,772	17.4%
Colombia	8,077	13.6%
Indonesia	8,003	6.9%
Turkey	8,467	4.4%
Iran	9,295	-3.3%
France	7,751	37.4%
Russia	4,802	-0.1%
Spain	8,165	41.2%
Germany	8,550	59.4%
Egypt	3,967	8.0%
Japan	13,449	14.1%
South Korea	40,755	3.2%

Implications of Slower Growth

Are you leading into the new paradigm?

- Colleges that have relied on enrollment growth to fund expansion will have to adapt to slower rates of growth
- Decision-makers should level-set growth expectations in light of localized market data
- Tracking and managing market share will become increasingly important (**Strong consideration should be given to strategies that target underserved communities, transfer pipelines, International recruitment, and Adult Students**).
- Modality and position in the market are, and will continue to be, important factors in the future.
- The most successful institutions are deploying a diversified set of demand generation strategies identified through a strategic enrollment planning process.

In this environment, most institutions need to focus on stimulating additional demand to grow/shape enrollment and optimize net tuition revenue



Where will your institution turn to access new demand in order to increase Enrollment and Revenue?

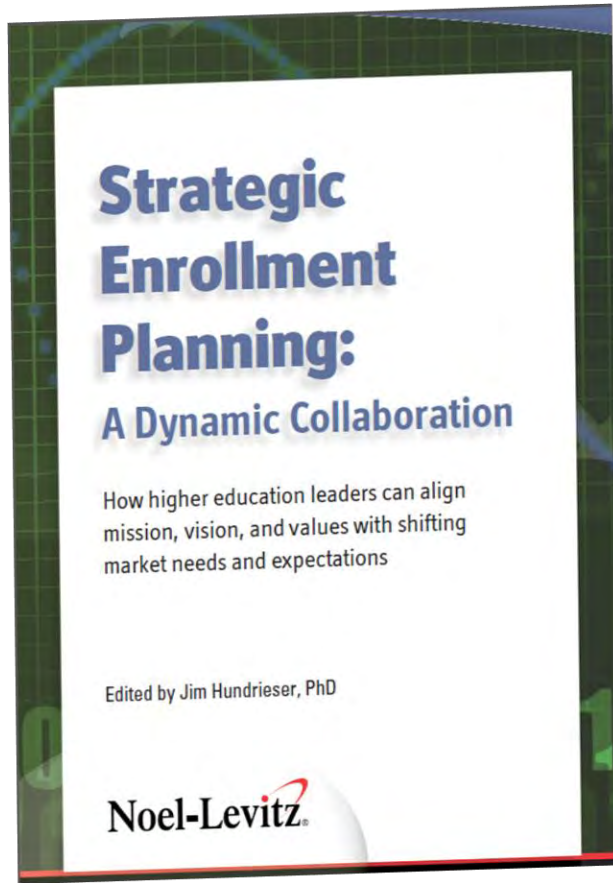
Considerations for stimulating new demand: balance of strategies across these six dimensions. . .

- **Program** (academic, co-curricular, services, support)
- **Place** (on-site, off-site, online, hybrid)
- **Price and Revenue** (tuition, fees, discounts, incentives)
- **Promotion** (marketing, recruitment, web presence)
- **Purpose and Identity** (mission, distinctiveness, brand)
- **Process** (data-informed, integrated planning)



... and balance across the Ansoff growth strategy matrix

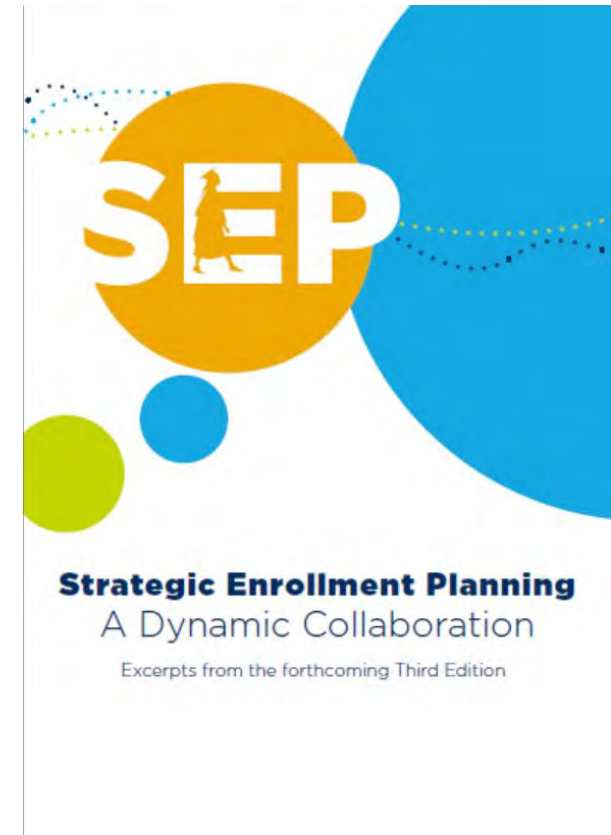
	Existing Programs/Services	New Programs/Services
Existing Markets	Market Penetration	Program Development
New Markets	Market Development	Diversification



2012



2016



2023

Strategic Enrollment Planning

The four-phase recursive process





POINT LOMA

NAZARENE UNIVERSITY

PLNU Now

- Main Campus: 90 Acres along the Pacific Ocean in California
- Regional Centers: Mission Valley, Balboa (opened in 2021), Liberty Station, Bakersfield, 8 San Diego Community Colleges, & Online
- Total Enrollment = 4,445
(5,375 Unduplicated Headcount)
- Undergraduate Enrollment = 2,639





Institutional Context before SEP

- Static enrollment due to city-imposed cap on main campus (2000 FTE, 2350 TUG) enrollment
- Marginal growth in Graduate Programs (5% per year)
- No Adult Undergrad or On-Line program offerings
- \$10M structural deficit looming in 5 years if no change in enrollment strategy



Growth Since SEP

- New programs in TUG, AUG, and GRAD, with particular energy in adult completion programs and graduate programs (now mostly on-line)
- Focus in Business, Education, and Allied Health (PA program, DNP and FNP for MSN, MACC, LPCC and MFT tracks), adding OT, PT, and Speech Therapy, considering a Psy.D.
- Community college partnerships which aided the launch of adult focused degree completion. Began F2F and now moving on-line
- Investment in market aligned programs and program verticals



Institutional Takeaways with SEP

- Renewed focus on innovation (Audience, Modality, Market)
- Paying attention to data (gathering, analysis, and decision drivers)
- Valuing ideas and creative thinking (no idea was bad, everything considered)
- Prioritization of current offerings, occurring alongside new program development
- Recognition of SEP and prioritization as ongoing engagements, rather than one-time or periodic events



Questions?

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Thank you for attending
this session!