The Looming Enrollment Crisis

How colleges are responding to shifting demographics and new student needs
Section 1
A Turbulent Future for Enrollment
Most colleges can no longer count on students simply showing up on their doorstep every year: Financial worries, declining birth rates, and growing skepticism about the value of college portend a major enrollment crisis. For some colleges, that’s already arrived.
- Data tables show enrollment patterns nationwide.
- Figures from 42 colleges compare 2019 fall enrollment with that of the previous year.

Section 2
Weathering the Storm
The enrollment crisis provides an opportunity for colleges to do some deep thinking about who they are, who they serve, and, in some extreme cases, whether they should merge or close.
- A Chronicle survey of 262 enrollment officers uncovers anxiety as well optimism.

Section 3
How Colleges are Responding: 10 Case Studies
Some of the takeaways: Know your students, offer the right mix of academic programs, watch your costs. And don’t be afraid to try something new.

Section 4
Enrollment Experts Speak Out
Those on the front line discuss strategies, fears, and the future.

Further Reading
This group of seventh-grade students will enter the 12th grade in 2025.
A Turbulent Future for Enrollment

By ERIC KELDERMAN

Higher education finds itself in the outer band of a massive and slow-moving storm, threatened by years of financial strain, a downturn in the nation’s birthrate, and growing skepticism about the price and value of a college degree.

The fallout from the Great Recession has left institutions more dependent on tuition revenue than ever before, even as students and families find it harder to afford college. Concerns about tuition and student-loan debt are making potential students far more discerning about how much they are willing to spend and where they enroll.

Enrollment has already begun to fall after the peak of the 2008 recession, and by fall 2019 even some selective colleges — which rarely have had to worry about filling their classes — missed their enrollment goals. In just a few years, the pool of likely college students is expected to become much smaller and more racially diverse. States in the Northeast and Upper Midwest, which have the greatest concentration of colleges, will see the biggest decline in high-school graduates.

Declining birthrates, financial concerns, and questions about the value of college are widely expected to lead to an enrollment crisis.

States in the Northeast and Upper Midwest will see the biggest decline in high-school graduates.

The pool of likely students is expected to become much smaller and more racially diverse.

Some colleges will have to make difficult choices about their enrollment practices, academic offerings, and makeup of their student body.

The most-selective private colleges and public flagships are expected to fare the best.

Colleges cannot control demographics but can improve retention and graduation rates.
All of this means that some types of institutions can expect major difficulties in meeting enrollment and revenue goals. At worst, recruiting the right mix of the students who can both afford tuition and succeed in college will become an existential challenge for many institutions over the next decade and beyond.

At the least, it will force some colleges to make difficult choices about their enrollment practices and academic offerings, as well as the size and makeup of their student body.

“If you can’t get the best class, what’s the way forward?” asks Stefanie Niles, vice president for enrollment and communications at Ohio Wesleyan University. “My institution has started some difficult conversations about not growing but actually getting smaller, to get more students who are likely to complete their degrees.” Niles is president of the National Association for College Admission Counseling, known as NACAC.

HOW WE GOT HERE

The looming challenges represent a new set of problems for a sector that has experienced continued growth since the mid-20th century.

Total fall enrollment in higher education has increased from about 8.6 million in 1970 to nearly 20 million in 2018, according to federal data. Over the same period, the percentage of the U.S. population with a four-year degree or higher has grown from just 11 percent to 34 percent, the National Center for Education Statistics reports.

The growth was fueled, initially, by federal money from the GI Bill, which paved the way for more than two million veterans of World War II to earn college degrees, creating an expectation for their children, the baby boomers, to follow suit. The federal investment has increased considerably since then, with Pell Grants for low-income students, money to support work-study programs on campus, and loans backed and now issued by the government.

States, too, made large investments in higher education, with direct support of public campuses, scholarships for students there, and, in some states, grants to in-state students who attend private colleges.

But as enrollment has grown, so has the cost of providing a college degree, while support from states and the federal government has not. The result has been that institutions are increasingly reliant on that tuition, rather than on government subsidies, to meet their budgets. At the same time, students are paying more to cover the cost of college.

At public four-year colleges, net tuition per student (not including grant aid) has doubled over the past 20 years, from $1,870 in the 1998-99 academic year to $3,740 in 2018-19, in constant 2018 dollars, according to the College Board. Net tuition at private nonprofit colleges grew much more slowly over the same period, from $12,750 to $14,610.

State appropriations per full-time student fell from $9,290 in 1998 to $7,900 in 2018, according to figures from the State Higher Education Executive Officers Association (known as Sheeo). A quarter-century ago, revenue from tuition accounted for 31 percent of the education budgets of colleges and universities. In 2018 it was 47 percent, according to the association.

IT’S THE ECONOMY

The recession of 2008 brought many of higher education’s financial challenges into sharp focus. As often happens during economic downturns, enrollment soared, increasing nearly 10 percent nationally from 2008 to 2011, as state budgets tanked and endowment values plunged.

The long recovery since that time has stabilized some parts of the economy, yet fi-

“My institution has started some difficult conversations about not growing but actually getting smaller, to get more students who are likely to complete their degrees.”
nancial conditions in certain sectors of higher education seem to be as tenuous as ever. Enrollments, overall, have now fallen for seven consecutive years, but remain higher than they were before the recession.

For the second year in a row, Moody's Investors Service issued a negative outlook for higher education in 2019, saying that operating expenses, such as the cost of labor, will grow faster than tuition revenue. Falling enrollments play a part in that, the analysts wrote, because many students were opting for employment as the economy grew. And competition for the shrinking number of students means that colleges will seek to keep the price of tuition as low as possible.

The Sheeo annual report on state finances in 2019 concluded that a decade after the start of the recession, “state funding for higher education has only halfway recovered, while the growing reliance on net tuition as a revenue source — the student share — remains at a near high.”

The fragility of some public institutions comes into relief in states like Alaska, where the governor slashed 41 percent of the university system’s budget in July 2019, leading to a vote on financial exigency and plans for major reductions in faculty and programs, and the possibility of campus closures or mergers.

After a political backlash, the governor agreed to lessen the cuts, but plans remain for some faculty layoffs, and the system is moving forward with a controversial plan to consolidate its accreditation.

Private colleges are facing their own set of problems in the aftermath of the recession, related to stagnant family incomes and concerns about the price and value of college. As both operating costs and tuition prices have risen, private colleges have repeatedly increased the tuition discounts they offer in the form of

Stefanie Niles, vice president for enrollment and communications at Ohio Wesleyan University, says liberal-arts institutions like hers will be more pressed by families on how educational offerings connect to career goals. Here, Niles (center) talks to prospective students.
A New Set of Challenges

FINANCIAL PRESSURES
For the second year in a row, Moody’s Investors Service posted a negative outlook for the U.S. higher-education market in 2019.

4%
Expected overall operating-expense growth

3.7%
Projected revenue growth

>50%
Public colleges that will fall short of 3% revenue growth, Moody’s minimum for a stable outlook

>40%
Private colleges that will fall short of 3% revenue growth

1 to 3.5%
Projected growth in net tuition, most colleges’ main source of revenue

ENROLLMENT IS ALREADY FALLING
Recent semesters have brought fewer students, except in 2018-19 at four-year private nonprofit colleges.

Annual percentage change in enrollment

<table>
<thead>
<tr>
<th></th>
<th>Spring 2017</th>
<th>Fall 2017</th>
<th>Spring 2018</th>
<th>Fall 2018</th>
<th>Spring 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-year private nonprofit</td>
<td>-0.2%</td>
<td>-0.4%</td>
<td>-0.4%</td>
<td>2.4%</td>
<td>3.2%</td>
</tr>
<tr>
<td>4-year public</td>
<td>0.2%</td>
<td>-0.2%</td>
<td>-0.2%</td>
<td>0%</td>
<td>-0.9%</td>
</tr>
<tr>
<td>2-year public</td>
<td>-2.5%</td>
<td>-1.7%</td>
<td>-2.0%</td>
<td>-3.2%</td>
<td>-3.4%</td>
</tr>
</tbody>
</table>

Source: National Student Clearinghouse Research Center, Current Term Enrollment - Spring 2019

Note: Overall expense and revenue figures exclude healthcare operations.
Source: Moody’s Investors Service, 2019 Higher Education (U.S.) Outlook
DECLINING STUDENT DEMAND
A leading state-level forecast of traditional-age college-going students shows sharp declines across much of the country through 2029.

PUBLIC DISTRUST
The general population is skeptical of colleges.

Americans who say higher education is going in the wrong direction:

61%

Those who say a major reason is:

Tuition costs are too high: 84%
Students don’t get the skills they need to succeed in the workplace: 65%

Source: Pew Research Center, 2018 American Trends Panel

Note: Forecast is of 18-year-old college-going students.
Source: Demographics and the Demand for Higher Education by Nathan D. Grawe
merit aid to students.

In 2018, that discount for first-time freshmen at private colleges averaged more than 52 percent of tuition and fees, according to an annual survey by the National Association of College and University Business Officers (Nacubo). The average amount of tuition-discount aid has nearly doubled since 2008, the survey found, while the published price of tuition and fees has increased 47 percent — meaning that the high tuition/high discount approach has become a losing proposition for some colleges.

“Tuition discounting has inched across the 50-percent mark at a time when most if not all institutions realize they have to be very conservative in their cost increases,” says Jim Hundrieser, vice president for consulting at Nacubo. “Both access and quality are equally important — and how do you balance those when you can’t raise tuition like you did in the 1980s?”

Since 2018 several small institutions in New England have shut their doors or announced plans to close, including Green Mountain, Mount Ida, Newbury, and Southern Vermont Colleges, and the College of St. Joseph.

Many higher-education experts say the overall number of closings is no higher than in the past. A study from the American Council on Education found that 86 percent of colleges that closed from 2014 to 2017 were for-profit institutions.

Mergers between colleges is another emerging phenomenon, seen as a way to overcome the challenges of lagging enrollment and the natural inefficiencies of small colleges. There is skepticism, though, that merging two similar institutions provides any buffer from the widespread challenges now facing such institutions. Looking at the 55 private, nonprofit colleges that ceased to exist between 2016 and 2019, Robert Witt and Kevin P. Coyne found that just 14 merged, and that all but one were either small or niche institutions absorbed by a larger college.

“So while there will likely be a handful of mergers among private nonprofit colleges in the future,” Witt and Coyne wrote in The Chronicle, “the data suggest that most will be unusual — based on atypical factors, like those of the past few years.”

**MEDIAN HOUSEHOLD INCOME HAS RISEN ONLY SLIGHTLY FROM 2007**

<table>
<thead>
<tr>
<th>Year</th>
<th>Median Household Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>$64,000</td>
</tr>
<tr>
<td>2008</td>
<td>$62,000</td>
</tr>
<tr>
<td>2009</td>
<td>$60,000</td>
</tr>
<tr>
<td>2010</td>
<td>$58,000</td>
</tr>
<tr>
<td>2011</td>
<td>$56,000</td>
</tr>
<tr>
<td>2012</td>
<td>$54,000</td>
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<td>2013</td>
<td>$52,000</td>
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<td>2014</td>
<td>$50,000</td>
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<tr>
<td>2015</td>
<td>$48,000</td>
</tr>
<tr>
<td>2016</td>
<td>$46,000</td>
</tr>
<tr>
<td>2017</td>
<td>$44,000</td>
</tr>
<tr>
<td>2018</td>
<td>$42,000</td>
</tr>
</tbody>
</table>

Note: Figures were adjusted for inflation and are represented in 2018 dollars.

**OUTSTANDING STUDENT DEBT PER RECIPIENT GROWS STEADILY**

<table>
<thead>
<tr>
<th>Year</th>
<th>Outstanding Student-Loan Debt</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>$20,000</td>
</tr>
<tr>
<td>2008</td>
<td>$25,000</td>
</tr>
<tr>
<td>2009</td>
<td>$30,000</td>
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<tr>
<td>2010</td>
<td>$35,000</td>
</tr>
<tr>
<td>2011</td>
<td>$40,000</td>
</tr>
<tr>
<td>2012</td>
<td>$45,000</td>
</tr>
<tr>
<td>2013</td>
<td>$50,000</td>
</tr>
<tr>
<td>2014</td>
<td>$55,000</td>
</tr>
<tr>
<td>2015</td>
<td>$60,000</td>
</tr>
<tr>
<td>2016</td>
<td>$65,000</td>
</tr>
<tr>
<td>2017</td>
<td>$70,000</td>
</tr>
<tr>
<td>2018</td>
<td>$75,000</td>
</tr>
</tbody>
</table>

Note: Average outstanding student-loan debt per recipient covers outstanding principal and interest balances. Figures were adjusted to 2018 dollars, except for 2019, which is in current dollars.

Source: Chronicle analysis of National Student Loan Data System’s federal-student-aid portfolio summary.
THE IMPENDING CLIFF

The Great Recession had another impact that will be felt across higher education: a steep drop in the nation’s birthrate after 2008. This “birth dearth,” as it has been called by Nathan D. Grawe, a professor of economics at Carleton College, will result in a decline in the number of traditional-age college students after 2025, and to shifts in enrollment patterns across the nation.

A chart of this phenomenon looks like a cliff with a 4.5-percent increase in high-school graduates between 2020 and 2025 then a nearly 9-percent-plunge that bottoms out in 2031, according to projections from the Western Interstate Compact for Higher Education. The effects will be far greater in certain parts of the country. In the Northeast and Midwest, the number of high-school graduates peaked in 2010 and is already on a long slide. By 2031 the expected number of high-school graduates in those regions will have fallen 14 percent, according to the Wiche data, with an even greater decline in certain states in those regions.

The number of high-school graduates is projected to fall more than 15 percent in five states in the Northeast — Maine, New Hampshire, New Jersey, Rhode Island, and Vermont. In the Midwest, three states — Illinois, Ohio, and Wisconsin — are expected to face similar declines.

In the South and West, the trends look different, with a steady increase in high-school grads until the decline after 2025. By then “the South will generate about 10 percent more graduates than in 2013 and will be primarily responsible for the growth predicted for the nation around 2025,” says Wiche. “The West is projected to have modest growth (4 percent) in the total number of high-school graduates through 2024.”

The regional changes are almost entirely the result of the differing rates of population growth among racial groups. As a whole, the

“Both access and quality are equally important — and how do you balance those when you can’t raise tuition like you did in the 1980s?”

In September 2008, the investment bank Lehman Brothers went bankrupt, a key factor in the Great Recession, which led to a steep drop in the nation’s birthrates. That decline is expected to trigger enrollment challenges for colleges in years ahead.

JON ENOCH, EYEVINE, REDUX
Looking Back: Enrollment Winners and Losers

PAINFUL YEARS FOR FOR-PROFITS
By 2017, overall college enrollment had dropped nearly 6 percent since its peak in 2010. The for-profit sector was the biggest loser, while enrollment in three sectors actually grew.

<table>
<thead>
<tr>
<th>Sector</th>
<th>2010</th>
<th>2017</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-year public</td>
<td>7,923,091</td>
<td>8,856,035</td>
<td>11.8</td>
</tr>
<tr>
<td>4-year private nonprofit</td>
<td>3,836,897</td>
<td>4,074,762</td>
<td>6.2</td>
</tr>
<tr>
<td>4-year for-profit</td>
<td>1,589,934</td>
<td>914,454</td>
<td>-42.5</td>
</tr>
<tr>
<td>2-year public</td>
<td>7,218,063</td>
<td>5,706,678</td>
<td>-20.9</td>
</tr>
<tr>
<td>2-year private nonprofit</td>
<td>32,683</td>
<td>48,390</td>
<td>48.1</td>
</tr>
<tr>
<td>2-year for-profit</td>
<td>432,851</td>
<td>186,701</td>
<td>-56.9</td>
</tr>
<tr>
<td>All 6 sectors</td>
<td>21,033,519</td>
<td>19,787,020</td>
<td>-5.9</td>
</tr>
</tbody>
</table>

Note: More than 60 percent of the gain for four-year public institutions and 38 percent of the loss for two-year public institutions can be attributed to two-year colleges becoming identified as four-year colleges after they began offering bachelor’s degrees.

Source: Chronicle analysis of U.S. Department of Education data

A BIG JUMP IN EXCLUSIVELY ONLINE LEARNERS
From 2012 to 2017, enrollment of students who were exclusively taking distance-education courses dropped by more than 260,000 in the for-profit sector as that sector shrank. But growth in other sectors resulted in a net gain of nearly half a million students enrolled in distance education only.

<table>
<thead>
<tr>
<th>Sector</th>
<th>2012</th>
<th>2017</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-year public</td>
<td>576,262</td>
<td>915,454</td>
<td>58.9%</td>
</tr>
<tr>
<td>4-year private nonprofit</td>
<td>468,284</td>
<td>778,775</td>
<td>66.3%</td>
</tr>
<tr>
<td>4-year for-profit</td>
<td>901,590</td>
<td>652,567</td>
<td>-27.6%</td>
</tr>
<tr>
<td>2-year public</td>
<td>655,920</td>
<td>743,259</td>
<td>13.3%</td>
</tr>
<tr>
<td>2-year private nonprofit</td>
<td>767</td>
<td>19,721</td>
<td>2,471.2%</td>
</tr>
<tr>
<td>2-year for-profit</td>
<td>21,534</td>
<td>10,157</td>
<td>-52.8%</td>
</tr>
<tr>
<td>All 6 sectors</td>
<td>2,624,357</td>
<td>3,119,993</td>
<td>18.9%</td>
</tr>
</tbody>
</table>

Note: 2012 was the first year the U.S. Department of Education required reporting of students enrolled exclusively in online education.

Source: Chronicle analysis of U.S. Department of Education data

UNDERGRADUATE LOSS
Enrollment of graduate students has grown, but not nearly as much as undergraduate enrollment has fallen.

<table>
<thead>
<tr>
<th>2010</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduates</td>
<td>18,089,391</td>
</tr>
<tr>
<td>Graduate students</td>
<td>2,944,128</td>
</tr>
</tbody>
</table>

Source: Chronicle analysis of U.S. Department of Education data

DECLINE IN NUMBER OF FULL-TIME UNDERGRADUATES
The number of full-time undergraduates fell more than the number of part-time undergraduates.

<table>
<thead>
<tr>
<th>2010</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time undergraduates</td>
<td>11,461,944</td>
</tr>
<tr>
<td>Part-time undergraduates</td>
<td>6,627,447</td>
</tr>
</tbody>
</table>

Source: Chronicle analysis of U.S. Department of Education data

ADULT UNDERGRADUATES ARE GETTING SCARCE
The number of undergraduates age 25 and older dropped by more than 1.5 million from 2011 to 2017, while the number under age 25 grew by more than 250,000.

<table>
<thead>
<tr>
<th>2011</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age under 25</td>
<td>12,026,191</td>
</tr>
<tr>
<td>Age 25 and older</td>
<td>5,986,006</td>
</tr>
</tbody>
</table>

Note: Figures represent all undergraduates whose age was known.
Source: Chronicle analysis of U.S. Department of Education data
**What’s Ahead**

**HIGH SCHOOL GRADUATES IN THE U.S.**

The number of new high-school graduates in the United States is expected to increase each year from 2020-21 through 2024-25. It will then fall each of the following four years, dropping by nearly 300,000 graduates from 2024-25 to 2028-29, a loss of more than 8 percent.

![Graph showing projected change in millions of high school graduates]

Note: The number for 2010-11 is the reported count. Projections begin with 2011-12. Totals include graduates of both public and private high schools but exclude home-schooled students.


**HIGH SCHOOL GRADUATES BY REGION**

The number of new high-school graduates is expected to fall in three of the country’s four main regions from 2010-11 to 2031-32, with growth projected only in the South. Declines in the Northeast and Midwest are already well under way.

![Graphs showing projected change by region]

United States is expected to have a majority-minority population by 2043, and the projections of high-school graduates follow accordingly.

The number of white high-school graduates will decline the most, according to the Wiche analysis: “By 2030, the number of white public-school graduates is projected to decrease by 14 percent compared to 2013.” The increase in the number of students of color, however, will almost match the decrease in white students for several years, before students of color, too, will decline somewhat, says the Wiche report.

“Between 2018 and 2028, growth in the number of non-white public-high-school graduates is projected to replace the numerical decrease in white graduates to a varying extent,” the report says. The number of minority students will also decline somewhat after 2029, Wiche estimates, but will still be higher than in 2013.

The number of Hispanic high-school graduates will grow by nearly 50 percent before 2025, the Wiche report says, before it falls about 14 percent by 2032. The number of Asian high-school graduates is far smaller but is expected to grow consistently beyond the next decade.

WINNERS AND LOSERS

The demographic forecasts are little surprise to many in higher education. But Grawe has made a more nuanced analysis of how they may affect college enrollment by projecting how the demographic changes will affect the students who are most likely to attend college.

At the broadest level, enrollment may be hit hardest by a decline in white high-school graduates, who have typically made up the majority of the college-going population, Grawe writes in his book, *Demographics and the Demand for Higher Education* (Johns Hopkins University Press, 2018). The areas that will see the biggest declines in white students also have the largest number of colleges, especially small, private ones.

At the same time, the expected increase in the number of Hispanic high-school graduates will be concentrated mostly in the Southern and Western states — which have had a lower concentration of colleges and lower rates of col-

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**TUITION-DISCOUNT RATES KEEP GETTING MORE GENEROUS**

The share of revenue from tuition and fees that went back to first-time, full-time freshmen at private nonprofit institutions in the form of scholarships and grants surpassed 50 percent for the first time in 2017-18.

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*Preliminary estimate*  
Source: National Association of College and University Business Officers
college going. Those changes won’t automatically mean a big decline at all colleges in the Northeast, or an increase in the number of students in the South, Grawe writes. Instead, enrollment patterns at individual institutions will depend to a large degree on their status and reputation.

Grawe’s work should have hit any college leader “like a ton of bricks,” says Kent Devereaux, president of Goucher College, just outside Baltimore. Colleges are in trouble, he adds, if they’re “not looking at those numbers five years out and saying what are we going to do to be prepared for that?”

The likely winners in this scenario are, not surprisingly, very selective private colleges and flagship public institutions that have a well-known brand and the ability to recruit students across state lines and even internationally. In his book, Grawe projects that enrollment at such institutions could grow by nearly a quarter before 2025, when their enrollment would fall by 9 percent.

Not all of the projections are gloomy. Grawe explains that his book is looking at future demand for higher education based on current practice and policy. But there is a much higher percentage of college-educated parents than in the past, and their children are more likely to attend college than previous generations were.

If the overall number of high-school graduates declines and the most-selective colleges do not increase their capacity, then a sort of spillover of students could enroll at less selective institutions, Grawe writes. Another possible bright spot, he says in an interview, is that there has been a sharp increase in the percentage of Hispanic students who are likely to attend college. If that trend holds, it could offset at least some of the expected decline in overall enrollment.

However, the bulk of colleges that are not selective, or that offer open access, and rely on students who live within driving distance, will be more subject to the demographic trends of the region, according to Grawe.

Two-year colleges in particular could be the biggest losers. “The primary challenge for the two-year sector in the next 15 years is clear: dramatically reduced enrollments,” Grawe writes. “Indeed, the expected rate of contraction in two-year enrollments is almost 20 percent faster than for college enrollments in general.”
Enrollment challenges are “top of mind” for campus leaders, says Martha Parham, senior vice president for public relations at the American Association of Community Colleges. Small, rural colleges are at the greatest risk for a steep enrollment decline, she says, even though they are crucial to their communities as the only available option for higher education.

“What happens in a social-justice sense,” she asks, “when there is no access to higher education in those areas?”

Others are concerned that even as the share of minority students increases, more-selective public colleges will continue to focus their recruiting efforts on white students. James Kvaal, president of the Institute for College Access & Success, says minorities are already overrepresented at community colleges and regional public institutions, which get far less support per student from state governments than do flagship universities.

**NEW SKEPTICISM AND PRICE SENSITIVITY**

On top of the fiscal and demographic pressures, colleges are facing a skeptical public, which now questions both the ability of higher education to prepare students for the workplace and the cost of doing so.

A 2019 poll by the think tank New America found that most respondents believe that people with college credentials are better able to find job opportunities. But only a third think higher education is “fine just the way it is.” A little less than half believe “Americans can get a high-quality education after high school that is also affordable.”

New America’s poll also found a majority who say community colleges and public four-year colleges and universities are worth the price (81 percent and 65 percent, respectively). But lower proportions of respondents believe that private (44 percent) and for-profit (40 percent) colleges are worth the price.

Some in higher education believe that price sensitivity is starting to affect the competition for students. The number of colleges that are keeping their applications open past May 1 has increased by 27 percent in recent years, according to the National Association for College Admission Counseling.

Some selective private colleges, like Bucknell University, that have in the past had no trouble meeting enrollment goals are now losing students to lower-priced public universities with similar academic programs. Bucknell’s biggest competitor has become Pennsylvania State University, with the University of Delaware also among the top five, probably because it has a more-affordable...
fordable engineering program, says Bill Conley, Bucknell’s vice president for enrollment management.

Dennis Gephardt, a vice president and higher-education analyst at Moody’s, says only the most selective private and public colleges are now protected from this price sensitivity. “For most of the middle, that’s not the case,” he says. And even if they are meeting enrollment targets, they may be “hitting a wall on the price,” he says, finding themselves trapped in the cycle of spending more on financial aid than they are generating in net tuition revenue.

Price could also become a big factor in the decision of students who might be considering a niche institution, such as a women’s or faith-based institution, says Joshua Brown, an instructor of leadership, policy, and foundations at the University of Virginia. “They will pay that extra price in order to be in that value-based environment. But if there comes a time when they question the validity of that environment, they’ve got public schools at home that are less expensive.”

Niles, the president of NACAC, the admissions-counselors association, says liberal-arts colleges, too, could feel the pressure, because the public doesn’t connect those institutions with career preparation. “I work for a liberal-arts institution, so people who are there have already considered the benefits,” she says. “But families have to make hard decisions. It comes down to money at enrollment. I do see that it is more difficult for families to make that investment.”

WHAT COLLEGES CAN CONTROL

All of this adds up to a difficult future, not only for enrollment managers but also for administrators and faculty members across departments and disciplines. They will have to make key decisions about spending and revenue, about the kinds of students the institution can enroll, and about academic and support programs the college can provide for them.

In addition to the current challenges, the economy could suffer another recession, which would spur some new enrollment but also create greater financial uncertainty for both families and institutions.

A recent development may also create even fiercer competition for students. In order to avoid a federal antitrust suit, NACAC has adopted new guidelines, which allow colleges to recruit students even after they have signaled their commitment to another college.

“Families have to make hard decisions. It comes down to money at enrollment. I do see that it is more difficult for families to make that investment.”

Despite the scope of its problems, many think higher education will survive, though with a different look. Gephardt, the Moody’s analyst, says more small, private colleges will close, but that mergers are a viable option.

One way forward, says Grawe, the economist at Carleton College, is to focus less on recruiting new students and more on practices to keep current students. “Demographics are the thing we have the least control over,” he says, but colleges “can change practices to improve retention and graduation.” Such an approach, he adds, might also help persuade students and the public about the value of the degree.

Many colleges will have to look beyond their traditional missions to serve a more diverse population of students, argues Niles. “It’s too risky,” she says, “to focus on white, wealthy students.”

“Many of my colleagues, particularly those with experience, have seen the tide shifting and realize that no matter how well we market ourselves, there will be fewer students and different kinds of students.”
Phong Le, associate professor of mathematics at Goucher College, teaches a course in the new Integrative Data Analytics major there.
The signs have been there for years — warnings about waning demographics, a tougher time filling out fall classes, rising costs, rising resentment from tuition-paying families. As institutions fail to make their enrollment targets and eye their annual budgets nervously, it’s clear that it’s no longer business as usual for many colleges. The enrollment crisis is here.

Many colleges face an existential dilemma. They can hope and pray that the assumptions and practices that have sustained them for decades will, somehow, see them through an uncertain, and in many ways unpromising, future. Or they can look for ways to adapt to that future.

But adapt how? What strategies and tactics might help them shore up their finances, weather the worst of demographic challenges, stabilize their business models, and better prepare them to face a new age?

TAKEAWAYS:

Many colleges will have to change their usual practices, and not just compete for the same students, to survive the enrollment crisis.

Colleges should carefully consider what value they offer students, while balancing revenue, cost, and the right mix of academic programs.

It takes a united board and leadership to bring about genuine transformation.

Colleges must update their program offerings to reflect student demand, but must handle program cuts with great care.

Some colleges are making an effort to recruit more international, adult, and lower-income students.
This section of the report examines some of the things colleges are trying, or pondering, to deal with the changes overtaking the sector. Colleges must consider their value propositions, and how well-prepared their leadership is to meet, and embrace, transformation. They must parse which groups of students they can wager on to build their enrollments. They must grapple with the critical balance of revenue and cost. And they must consider the mix of programs that will prepare them, and their students, for the 21st century.

What they can’t do, most likely, is stand pat. “The days of yesteryear are gone,” says John T. Lawlor, principal of Lawlor Advisory, a company that consults for colleges.

The crisis will challenge most institutions to some degree. “You’ve got a problem that is not just centralized to private colleges or third-tier publics,” says Brian C. Mitchell, president of Brian Mitchell and Associates, a consulting company, and former president of Bucknell University and Washington & Jefferson College.

A small cadre of elite institutions with fat endowments and strong national brands can continue to enroll their pick of students. State flagships and public research universities should be insulated from the worst effects. But with the kind of student who can actually pay $60,000, or even $20,000, for a year of college in shorter supply, the high-tuition, high-discount financial model of many private colleges will be unsustainable. Many four-year public comprehensive universities, though relatively affordable, will feel the demographic pinch alongside their private peers.

Says Mitchell: The colleges that will be best positioned by 2030 will “be those that were the most adaptable.”

For decades, colleges have tried to grow their way out of problems. In a survey of college enrollment managers and other administrators conducted by Maguire Associates for The Chronicle, 79 percent of respondents said their institutions planned to grow enrollment in the near future. More than half of respondents hoped to increase the size of their freshman class in 2019, and 31 percent hoped to increase their class by more than 5 percent.

They shouldn’t necessarily bet their budgets on that, according to Richard L. Staislof, principal of the RPK Group, a company that consults for colleges. “Institutions across the board thinking they’re going to grow 5 percent, that runs very counter right to what we know is going on in the marketplace,” he says. Most colleges will not be able to rely on growth, but “it’s way easier to just say that than to make the hard choices about how you’re using the resources you already have.”

**QUESTIONING THE VALUE PROPOSITION**

Perhaps the most fundamental thing college leaders must try to understand about their institutions in 2019 is what is their value? Not their financial worth, or their cultural or intellectual importance, or their benefit to their communities and their graduates, but what do they offer to students? And, critically, is what they offer something students want?

For centuries, colleges have been built and shaped to offer a breadth of knowledge — the humanities and sciences of the classic liberal-arts curriculum, professions like medicine and law, business and communications, even agriculture. This assembled bounty of subjects has taken on the aura of an indivisible whole-cloth good, a treasure well worth the sometimes six figures a student and her family might pay for it.

It’s true, data indicate that a college education remains one of the most valuable investments a graduate ever makes.

The education that colleges offer and the
education that students want, and need, however, may be mismatched in essential ways. For many inside and outside academe, the idea of a college education still evokes “the afternoon seminar underneath the spreading boughs of the pine tree talking about Emily Dickinson,” says Bryan Alexander, a futurist and senior scholar at Georgetown University. But for many recent high-school graduates, having come of age in the wake of the Great Recession, the intellectual benefits of college may be subordinate to connecting to the world of work. That may mean less Dickinson and more cybersecurity or data analytics.

Many colleges live in denial of the changes in what students want, especially their interest in career preparation, and see ebbing enrollment as only a marketing challenge. They

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**SAMPLE OF PUBLIC INSTITUTION ENROLLMENT NUMBERS 2018-19**

We collected enrollment data for 2018 and 2019 from a sampling of colleges around the country. (Note: Data from some of the colleges is based on preliminary figures. Year-by-year enrollment numbers can be volatile, and the factors involved can vary.)

<table>
<thead>
<tr>
<th>Institution</th>
<th>2019 Enrollment</th>
<th>2018 Enrollment</th>
<th>Change</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black Hills State U.</td>
<td>3,858</td>
<td>4,035</td>
<td>-177</td>
<td>S.D.</td>
</tr>
<tr>
<td>Bloomsburg U. of Pennsylvania*</td>
<td>8,689</td>
<td>8,924</td>
<td>-235</td>
<td>Pa.</td>
</tr>
<tr>
<td>California U. of Pennsylvania</td>
<td>6,842</td>
<td>7,312</td>
<td>-470</td>
<td>Pa.</td>
</tr>
<tr>
<td>Dakota State U.</td>
<td>3,268</td>
<td>3,382</td>
<td>-114</td>
<td>S.D.</td>
</tr>
<tr>
<td>Dixie State U.</td>
<td>11,193</td>
<td>9,950</td>
<td>1,243</td>
<td>Utah</td>
</tr>
<tr>
<td>U. of Florida</td>
<td>56,361</td>
<td>56,079</td>
<td>282</td>
<td>Fla.</td>
</tr>
<tr>
<td>U. of Illinois at Urbana-Champaign**</td>
<td>51,196</td>
<td>49,339</td>
<td>1,857</td>
<td>Ill.</td>
</tr>
<tr>
<td>U. of Iowa</td>
<td>32,535</td>
<td>32,948</td>
<td>-413</td>
<td>Iowa</td>
</tr>
<tr>
<td>Iowa State U.</td>
<td>33,391</td>
<td>34,992</td>
<td>-1,601</td>
<td>Iowa</td>
</tr>
<tr>
<td>U. of Nebraska at Lincoln***</td>
<td>25,332</td>
<td>25,820</td>
<td>-488</td>
<td>Neb.</td>
</tr>
<tr>
<td>U. of New Mexico</td>
<td>22,792</td>
<td>24,393</td>
<td>-1,601</td>
<td>N.M.</td>
</tr>
<tr>
<td>Ohio U.</td>
<td>68,262</td>
<td>68,100</td>
<td>162</td>
<td>Ohio</td>
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<tr>
<td>U. of Oklahoma</td>
<td>31,244</td>
<td>31,702</td>
<td>-458</td>
<td>Okla.</td>
</tr>
<tr>
<td>South Dakota School of Mines and Technology</td>
<td>2,529</td>
<td>2,654</td>
<td>-125</td>
<td>S.D.</td>
</tr>
<tr>
<td>Southern Utah U.</td>
<td>11,224</td>
<td>10,196</td>
<td>1,028</td>
<td>Utah</td>
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<tr>
<td>Texas A&amp;M U.</td>
<td>69,465</td>
<td>69,367</td>
<td>98</td>
<td>Tex.</td>
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<tr>
<td>U. of Utah</td>
<td>32,852</td>
<td>33,023</td>
<td>-171</td>
<td>Utah</td>
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<td>Utah State U.</td>
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<td>27,932</td>
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<td>Utah Valley U.</td>
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<td>39,931</td>
<td>1,894</td>
<td>Utah</td>
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<tr>
<td>Weber State U.</td>
<td>29,644</td>
<td>28,247</td>
<td>1,397</td>
<td>Utah</td>
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<tr>
<td>U. of Wisconsin at Madison</td>
<td>45,319</td>
<td>44,411</td>
<td>908</td>
<td>Wis.</td>
</tr>
</tbody>
</table>

Note: * Bloomsburg welcomed the largest first-year class in its history in 2019. ** 2019 enrollment is the largest in the U. of Illinois at Urbana-Champaign’s history. *** According to a press release, a slump in international student enrollment had a significant impact on this year’s total.
Staisloff says, but in many cases, “that’s just not true.” Institutions need to do a good job telling people about what they have to offer, but they must make sure that what they offer is something students want.

College leaders still pin their hopes more on salesmanship than on reconsidering what they’re selling. In the Chronicle’s survey of enrollment officers and other administrators, 68 percent of institutions had put more resources into digital marketing over the past five years to bolster enrollment, and only 47 percent had started new academic programs out of perceived demand, even though the latter was considered slightly more effective.

Leaders at the College of Wooster, in Ohio, knew that they needed to figure out how to inspire more students to enroll. “We looked

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**Comment from the Chronicle survey**

“Especially for private schools, outcome data are emerging as critically important. It is frustrating that lower-cost state schools get praise for their cost and ‘value’ but frequently don’t get called out on their low/poor outcomes like retention or four-year graduation rates.”

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**SAMPLE OF PRIVATE INSTITUTION ENROLLMENT NUMBERS 2018-19**

We collected enrollment data for 2018 and 2019 from a sampling of colleges around the country. (Note: Data from some of the colleges is based on preliminary figures. Year-by-year enrollment numbers can be volatile, and the factors involved can vary.)

<table>
<thead>
<tr>
<th>Institution</th>
<th>2019 Enrollment</th>
<th>2018 Enrollment</th>
<th>Change</th>
<th>State</th>
</tr>
</thead>
<tbody>
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<td>Allegheny College</td>
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<td>1,771</td>
<td>-4</td>
<td>Pa.</td>
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<tr>
<td>Assumption College</td>
<td>2,446</td>
<td>2,429</td>
<td>17</td>
<td>Mass.</td>
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<tr>
<td>Bennington College</td>
<td>799</td>
<td>796</td>
<td>3</td>
<td>Vt.</td>
</tr>
<tr>
<td>Carlow U.</td>
<td>2,022</td>
<td>2,076</td>
<td>-54</td>
<td>Pa.</td>
</tr>
<tr>
<td>Case Western Reserve U.</td>
<td>11,874</td>
<td>11,891</td>
<td>-17</td>
<td>Ohio</td>
</tr>
<tr>
<td>Colgate U.</td>
<td>2,994</td>
<td>2,978</td>
<td>16</td>
<td>N.Y.</td>
</tr>
<tr>
<td>Creighton U.</td>
<td>8,821</td>
<td>8,910</td>
<td>-89</td>
<td>Neb.</td>
</tr>
<tr>
<td>Dickinson College</td>
<td>2,120</td>
<td>2,377</td>
<td>-257</td>
<td>Pa.</td>
</tr>
<tr>
<td>Dordt U.**</td>
<td>1,547</td>
<td>1,569</td>
<td>-22</td>
<td>Iowa</td>
</tr>
<tr>
<td>Gettysburg College</td>
<td>2,623</td>
<td>2,644</td>
<td>-21</td>
<td>Pa.</td>
</tr>
<tr>
<td>Le Moyne College</td>
<td>2,684</td>
<td>2,674</td>
<td>10</td>
<td>N.Y.</td>
</tr>
<tr>
<td>Midland U.</td>
<td>1,254</td>
<td>1,238</td>
<td>16</td>
<td>Neb.</td>
</tr>
<tr>
<td>Mount Holyoke College</td>
<td>2,190</td>
<td>2,208</td>
<td>-18</td>
<td>Mass.</td>
</tr>
<tr>
<td>Northwestern College</td>
<td>1,412</td>
<td>1,307</td>
<td>105</td>
<td>Iowa</td>
</tr>
<tr>
<td>Rochester Institute of Technology</td>
<td>18,897</td>
<td>19,047</td>
<td>-150</td>
<td>N.Y.</td>
</tr>
<tr>
<td>Union College</td>
<td>2,157</td>
<td>2,178</td>
<td>-21</td>
<td>N.Y.</td>
</tr>
</tbody>
</table>

Note: *Clark’s class of 2023 is one of the largest in recent years. ** While Dordt had a decline in students from last year, 2018 was its largest enrollment ever, and 2019 was its second-largest.
each other in the eye and asked honestly, who in this room knows what would be inspiring to 17-year-olds?” says Sarah R. Bolton, the president. Commissioning research to learn what its prospective students want has helped her and her cabinet move away from, “Let’s argue about which of these is the best idea because someone just thinks it’s the best idea.”

That doesn't mean that Bolton plans to make all future decisions based on what 17-year-olds think, she says, “but it’s definitely the case that you don’t want to make decisions absent that information.”

For example, Wooster recently considered making leadership skills a focus of its appeal to students. Research indicated, however, that potential students weren’t much interested in leadership, but they were interested in a feeling of welcome and connection and inclusion — not just for retention, but also for recruitment. “We were surprised to find that, in our market study, that was actually the highest impact thing we could do,” Bolton says.

**LEADING FOR CHANGE**

Lawlor, the consultant, says that he’s seen more college presidents look to market research to inform their thinking about where to steer their institutions. But many leaders still rely on practices and assumptions formed during boom times. That may leave them unprepared for maneuvering in a new reality.

Before Kent Devereaux became president of Goucher College, in Maryland, he was president of the New Hampshire Institute of Art, in Manchester. When he took the institute job in 2015, the declining number of traditional-age high-school graduates in New England had already taken its toll. Enrollment at the tiny art college had dropped in each of the preceding four years to around 400 students. From the beginning, he says, he told the board of trustees that the institute would need to boost enrollment by as much as 15 percent per year. Failing that, he told them, the best strategy would be for the college to consider a merger with another institution.

Devereaux expanded the college’s recruiting far outside New England, and poured money into digital marketing. Enrollment grew by 5 percent the first year and 8 percent the next year. But after three years, enrollment still wasn’t growing fast enough, and data about declining demographics indicated that it wouldn’t get any easier. Devereaux and the board had had three years to ponder their chances and their options, and they decided, “We’re not gonna be able to outrun this,” he says. The institute spent a year quietly looking for partners and merged with New England College in the summer of 2019.

Devereaux took the job at the institute knowing that marketplace conditions might mean that the college would not make it, but he was surprised to find “how few college presidents, and how few boards, were even aware of the issue.” Several New England colleges had gone out of business during the previous three years, but during the merger process, he says, “I would get all kinds of calls from other presidents and other college boards. No clue. No clue.”

Reality is setting in for more leaders, Lawlor says, and he’s seen more presidents and boards work together to face it. But there are still exceptions.

When Roger N. Casey interviewed for the job of president of McDaniel College, in Maryland, 10 years ago, he asked the board, “Do you have the stomach for change?” No matter what they profess, trustees may not be ready for real change, or be patient enough to see it through.

Over the past decade, McDaniel has responded to changing demographics by more heavily recruiting lower-income students and students of color. In early 2019, the college eliminated five majors, including French, Ger-

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**Comment from the Chronicle survey**

“Currently presidents and boards expect enrollment departments to perform miracles each year to enroll enough students to survive, often on a shoestring budget. We’d like to do more, but are forced to live within our means. It’s not sustainable.”
Sarah R. Bolton, president of the College of Wooster, welcomes new students to campus.
man, and music, and announced new programs, including criminal justice and health sciences. McDaniel enrolled 637 new students in fall 2019, its largest incoming class ever.

Casey credits the board’s support and patience for much of the college’s transformation. “There are a lot of people who think, OK, we’re gonna make this shift, and if it doesn’t work, next year, let’s do something else,” he says. With strong and unwavering board support, “you can do some things that are really difficult to do in places in which you’ve got a divided board.”

A united board and leadership can make the difference, but so can a united cabinet. Having a tight team around him, Casey says, helped the college move quickly and decisively to make changes. He recently talked to the president at an institution that had made similar academic shifts but had seen a significant enrollment decline. The president told him that the college had continued to recruit students for shuttered majors because the provost and vice president for enrollment “don’t even talk to each other.”

**SEARCHING FOR STUDENTS**

The challenge facing colleges isn’t enrolling students, per se. That is, many colleges have “made good investments over the last decade-plus in the mechanics of the pipeline,” Staisloff says, and are better at finding and recruiting students than they ever have been. But there are fewer fresh 18-year-old high-school graduates to be enrolled. The economics professor Nathan D. Grawe’s analysis projects that the number of college-bound students in the Northeast and parts of the Midwest will drop by as much as 15 percent before 2029.

Colleges remain fixated on middle-class 18-year-olds for good reason. They are the students whose typically higher test scores and grade-point averages boost universities in national rankings and add to institutional prestige — a key consideration for many colleges. They are often more likely to be able to afford higher undergraduate tuition, although they are also more likely to weigh the amount of merit aid in their college decision. Colleges have focused on them, and counted on them, for decades, so perhaps habit plays a role.

But at almost any college in a region that’s demographically shrinking that’s still trying to find “any path to growth by pursuing the same students that everyone else is fighting over, it’s probably a road to nowhere,” says John L. Comerford, president of Otterbein University, in Ohio. “We certainly still pursue those students, but that’s not going to be an area of growth.”

For years, colleges have bolstered their enrollment, and their tuition revenue, by recruiting students internationally, largely from India and China. More colleges have joined them. In the Chronicle survey, 37 percent of respondents said they had expanded international recruiting over the past five years, and nearly half had found it effective. Less than 30 percent of respondents said that they planned to expand international recruiting in the future.

The College of Wooster, for example, has successfully expanded its recruiting abroad. In the early 2010s, the college enrolled about 35 new students from other countries. For the past few fall semesters, it has brought in as many as 100 freshman from 41 different nations, about a fifth of its entering class.

But international recruiting faces an uncertain future. Indian and Chinese students now have better homegrown higher-education options than they did even a decade ago. China’s growing global power, and its sometimes adversarial relationship with the United States, make it an unpredictable partner. McDaniel had planned to do a joint bachelor’s-degree project with Anhui Normal University, in China, where students in the college’s kinesiology...
program would study two years in China and two years in Maryland. “Overnight the Chinese government changes its mind,” says Casey, the president, and the program had to shift to three years and one year, respectively.

It doesn’t help that recent changes in U.S. immigration policy have effectively rolled up the welcome mat for foreign students. “Right now, the U.S. looks terrible on the world stage,” says Alexander, of Georgetown. In addition to the Trump administration’s Muslim ban, the ongoing series of mass shootings, even though most of them don’t take place on college campuses, “play beautifully in global media, from New Zealand to Morocco,” he adds. “We look like a bad and dangerous place, and that’s a serious enrollment hit.”

If more colleges try to recruit internationally, it will only increase the competition for students still prepared to come here. Colleges that have strong international recognition, or offer high-demand programs, can probably still bank on international students as a growth strategy, “but I don’t know that I’d hitch my wagon to that, overall,” Staisloff says.

If there is any place for global recruiting to expand, Alexander says, it’s sub-Saharan Africa. With the population of most of the developed world rapidly aging, “it’s the only region in the world that’s still producing 18-year-olds,” he says.

Most colleges are likely to try to recruit closer to home, among groups of students they had previously overlooked or bypassed. Public four-year colleges have long served as the next step for students transferring from two-year institutions, for example. About half of Illinois State University’s graduates arrive as transfers. But some private institutions are also looking at widening their funnel through transfer students. Goucher is one. “We’re looking at having people on the enrollment side focused on the transfer segment of our potential prospective students,” says Devereaux.

As with international students, the increased competition for first-time, full-time students may drive increased competition for transfers. At Evergreen State College, a public liberal-arts college in Olympia, Wash., transfer students made up about half of total enrollment.

But two years ago, the University of Washington at Seattle, about an hour away, made itself more transfer-friendly through more active recruiting and more transparent policies. To keep its share of transfer students, Evergreen State has sent staff members to community-college campuses to offer advising and transcript evaluations.

Adult learners represent one of the biggest untapped markets — more than 30 million Americans have some college credit but no degree, half again more than the 20 million currently enrolled. In Thurston County, Wash. where Evergreen is located, about 60,000 adults have some credit and no degree. “We’re having what feels like weekly conversations about how we might better serve adult learners,” Eric Pedersen, the college’s chief enrollment officer, says. The college does offer evening and weekend classes, but it doesn’t have many online hybrid courses, an increasingly popular medium for educating working people.

Otterbein used to focus a lot of effort on adults through a degree-completion program that it offered in cooperation with Columbus State University, enrolling as many as 900 students in classes that met on evenings and weekends. But the program faded away years before Comerford arrived in 2018. “Our traditional undergraduate population began to grow, so as the adult program shrank, you didn’t feel the pain of the lost revenue.” Otterbein is now looking to adults again to get beyond its traditional recruitment demographic, and hoping to offer more graduate, certificate, and professional development programs.

Colleges may benefit from building new

Comment from the Chronicle survey

“Big dislocation this year, regionally and nationally, up and down the academic food chain. We thought we had until 2025 to get ready, but no! Hard to predict how this shakes out.”
### COUNTING ON GROWTH

Has your institution looked to increase enrollment at any point during the past five years

- Yes [9%]
- No [89%]
- I don’t know [2%]

Will your institution look to increase enrollment at any point during the near future

- Yes [13%]
- No [79%]
- I don’t know [8%]

### Highlights From a Chronicle Survey of Enrollment Managers

**Counting on Growth**

- Has your institution looked to increase enrollment at any point during the past five years?
  - Yes [9%]
  - No [89%]
  - I don’t know [2%]

- Will your institution look to increase enrollment at any point during the near future?
  - Yes [13%]
  - No [79%]
  - I don’t know [8%]

**Taking Action**

Which of the following strategies have you tried in the past five years to help bolster enrollment?

- Put more resources into digital marketing [68%]
- Recruit more transfer students (or expand transfer pathways) [54%]
- Increase investment in student search [53%]
- Increase prospective student outreach through visits to high schools [50%]
- Increase investment of resources in admitted student yield efforts [50%]
- Expand recruiting out of state [50%]
- Increase prospective student outreach through partner organizations [49%]
- Start new academic programs out of perceived demand [47%]
- Expand recruiting locally [44%]
- Admit a higher number and/or proportion of applicants [41%]

Which of the following strategies do you plan to try or continue in the near future to help bolster enrollment?

- Put more resources into digital marketing [52%]
- Start new academic programs out of perceived demand [39%]
- Recruit more transfer students (or expand transfer pathways) [37%]
- Increase investment of resources in admitted student yield efforts [36%]
- Increase prospective student outreach through visits to high schools [36%]
- Expand recruiting out of state [32%]
- Increase investment in student search [30%]
- Increase prospective student outreach through partner organizations [29%]
- Expand recruiting internationally [29%]
- Expand recruiting locally [28%]

**How would you describe your institution’s goal for the class entering in fall 2019?**

- Increase the size of the freshman class by 5% or more [31%]
- Maintain the size of the freshman class [30%]
- Increase the size of the freshman class by less than 5% [26%]
- Decrease the size of the freshman class by 5% or more [5%]
- Decrease the size of the freshman class by less than 5% [5%]
- The institution did not have a freshman class enrollment goal [2%]

**What platform did you or do you plan to focus on for digital marketing?**

- Email Marketing Campaigns [46%]
- Instagram [44%]
- Website Development [44%]
- Search Engine Optimization [44%]
- Facebook [41%]
- Youtube [29%]
- Snapchat [16%]

Source: From a survey conducted for The Chronicle by Maguire Associates in September 2019
enrollment capacity among several different new types of students — in case international recruiting plummets, professional programs might welcome a wave of career-changers. “To borrow a metaphor from business, it’s having a balanced product portfolio,” Devereaux says.

While Grawe’s demographic analysis forecasts a dearth of traditional college-bound high-school graduates, it also points to a market that colleges could benefit from embracing. “The blue ocean in higher ed in undergrad is traditionally underserved populations,” Comerford says.

Casey agrees: “First generation is the future, and students of color, that’s the future.” Over the past 10 years, McDaniel, which is located in a county that is 93 percent white, has focused on recruiting and retaining students that other colleges perhaps weren’t working as hard to get. In the fall of 2007, the college enrolled one freshman from Baltimore, a predominantly African-American city about an hour away. In the fall of 2019, it enrolled 75, and McDaniel was two students shy of becoming a majority-minority institution.

Casey credits the college’s recruiting success, in part, to acknowledging the barriers students of color have faced and working institutionally to remove obstacles, including increasing need-based aid, eliminating application fees, and developing a summer bridge program for rising freshmen. It also entailed building relationships with high schools and organizations that serve communities of color, and doing well by their students. “Once you have those relationships established, there’s trust there,” says Janelle Holmboe, vice president for enrollment management and dean of admissions. “It’s very beneficial.”

The board recognized that, given the trends, if the college didn’t increase its focus on first-generation and lower-income students, and students of color, it wouldn’t be successful. “Look at the demographics — that’s where America’s headed,” Casey says. “If you

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**WHICH PROGRAMS ARE EXPANDING**

These are the fastest-growing programs since 2010-11.

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<thead>
<tr>
<th>Certificates</th>
<th>Net increase in programs</th>
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<tr>
<td>Welding technology</td>
<td>106</td>
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<tr>
<td>Emergency medical technology</td>
<td>84</td>
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<tr>
<td>Computer and information-systems security/information assurance</td>
<td>74</td>
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<tr>
<td>Computer support specialist</td>
<td>73</td>
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<tr>
<td>Web-page, digital/multimedia, and information-resources design</td>
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<th>Associate degrees</th>
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<td>Kinesiology and exercise science</td>
<td>79</td>
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<tr>
<td>Sociology</td>
<td>61</td>
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<tr>
<td>History</td>
<td>57</td>
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<tr>
<td>Health services/allied health/health sciences</td>
<td>56</td>
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<tr>
<td>Health-information/medical-records technology</td>
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<th>Bachelor’s degrees</th>
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<td>Kinesiology and exercise science</td>
<td>130</td>
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<tr>
<td>Multi/interdisciplinary studies</td>
<td>130</td>
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<tr>
<td>Registered nursing</td>
<td>130</td>
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<tr>
<td>Communication</td>
<td>117</td>
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<tr>
<td>Health/health-care administration/management</td>
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<th>Master’s degrees</th>
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<td>Organizational leadership</td>
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<tr>
<td>Business administration and management</td>
<td>94</td>
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<tr>
<td>Accounting</td>
<td>87</td>
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<tr>
<td>Educational leadership and administration</td>
<td>82</td>
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<tr>
<td>Mental-health counseling</td>
<td>82</td>
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Note: The figures represent net change, or the difference between two numbers: (A) unique institutions (for certificate and associate-degree programs, two-year public colleges; for bachelor’s- and master’s-degree programs, four-year public and private nonprofit colleges) that reported at least one completion for the given CIP code in 2010 or 2011 but zero in both 2016 and 2017 and (B) unique institutions that reported no completions for that CIP code in 2010 and 2011 but at least one in 2016 or 2017.

Source: Chronicle analysis of National Center for Education Statistics data
don’t know how to attract and retain diversity, if you don’t understand in-
cclusion, you’re not going to be here in the future.”

TUITION AND COST

About 40 percent of respondents in the Chronicle survey indicated that their institutions had raised their tuition-discount rates in the past five years to boost enrollment. Only about 19 percent said they planned to raise them again in the future. That difference jibes with a common view about the pricing of college: The high-tuition, high-discount model is unsustainable for many institutions.

Nearly every year, most colleges raise tuition in order to help cover increased costs. It may only go up 4 percent, but 4 percent of, say, $50,000 adds up to an extra $2,000 of cost to students and families. Over the last decade, many colleges have also increased their tuition-discount rates at a steady pace, plowing more and more of the money they collect each year back into institutional aid for top students they especially want to attract, or to enroll more students with financial need. Each year, tuition keeps rising, and for many institutions, revenue falters or falls.

Tuition discounting has begun to become a factor even at public universities. As state support pancaked after the recession and has risen only fitfully, tuition rates are increasing and the competition for top students — or, sometimes, any students — has increased. In the early 2000s, Illinois State University offered about $500,000 to potential students each year, says Jana Albrecht, associate vice president for enrollment management. Now it offers about $32 million.

But it is at private institutions, which function without even a modest backstop of state support, that tuition discounting has created the most precarious predicaments. Staissloff, the
consultant, says he knows of several colleges with discount rates of 60 percent or more for incoming freshman. Mitchell, the consultant, says he knows of institutions where discount rates have risen past 80 percent. These colleges have students, and may not look like they’re in trouble, he notes: “The grass will be cut and the dorms will be full the day they close.”

A coordinated strategy can make a difference. At Utica College, in upstate New York, total enrollment had grown steadily over the previous decade, but administrators were concerned about other numbers. In 2014, total cost of attendance was about $42,000 a year, but the average family income among students enrolled was only about $68,000. As at most colleges, tuition was still ticking upward every year. Families on the underside of that average income “were just writing us off based on sticker price alone,” says Jeffery T. Gates, senior vice president for student life and enrollment.

Many Utica students from less affluent families who did attend were taking out loans, to the point that the college landed on U.S. News & World Report’s list of the colleges where students have the most debt.

The college began a holistic look at its pricing structure, and at what it offered and how. In 2015, it decided to reset its tuition from $34,000 to less than $20,000. But it didn’t just reset tuition. It offered new programs in neuroscience, criminal-intelligence analysis, and sports management on its main campus. It began offering health-care programs through three locations in Florida. It introduced new programs online. Tuition resets have acquired a fraught reputation. In the short term, they can bring in more students, but they can also reduce net tuition revenue. In the long-term, tuition tends to creep back up to where it started. “When tuition resets don’t work, it’s when they are one-offs and not part of a strategy,” Gates says. “You’re just doing it as a knee-jerk because you missed your class by 10, 20, 30, whatever the number was.”

Utica’s reset was, in fact, too successful the first year. More than 680 new freshman showed up for fall classes in 2016, almost 100 more students than the college had planned. Utica had to rent rooms in a hotel a mile and a half from campus to house all of its new class.

But the reset, and the strategy surrounding it, has paid off. Undergraduate enrollment is now 2,503, up from 2,190 in fall 2015. The freshman discount rate has dropped from 61 percent in fall of 2015 to 27 percent in 2019. With the lower tuition, federal and state financial aid meets more of tuition costs, leading to a decrease in loan debt. Net tuition revenue rose from about $32 million in 2015-16 to $55 million in 2018-19.

Colleges have to be careful about their price points, however. “Some students and their families see price as a proxy for quality,” says Comerford, the Otterbein president. “The $40,000 school must be better than the $30,000 school.” That’s nonsense, he adds, but families “don’t understand tuition discounting, and how those sticker prices are just, frankly, made up.”

Otterbein’s undergraduate enrollment peaked at about 3,200 students just after the recession, fell as low as 2,700, and has climbed back to 2,950. The university has rebuilt enrollment, in part, by focusing more of its recruitment efforts on first-generation and lower-income students — a strategy that comes with its own challenges. “The problem is, even if you’re in the middle of the pack on price, your first-generation and low-income student will not understand how financial aid works and see that sticker price and be scared off.”

In 2018, Otterbein offered to meet the full financial need of any student eligible for federal Pell Grants. Last year’s incoming freshman class was 22 percent bigger, and most of that growth was among Pell-eligible students. But
even Pell eligibility isn’t always clear to families, so this year the university offered to meet full need for any student whose family income is $60,000 or less. “Just trying to make it as simple as possible,” Comerford says.

Recruiting more lower-income students is not only a social good, it can also make financial sense. “In a great ironic twist, our discount rate is much, much higher for those students at the very high end of the merit scale,” he adds. In the end, colleges may get more net tuition revenue out of some of their least affluent students.

Lawrence M. Schall, president of Oglethorpe University, in Atlanta, doesn’t understand the focus on a college’s sticker price. “If only 10 students are paying sticker price, why are people so obsessed with it?” he asks. He also doesn’t care about a college’s overall discount rate, which he calls “irrelevant.”

Two other numbers matter more to him: “What are you spending per student, and what’s your net tuition revenue per student, and are they sustainable?”

When he arrived at Oglethorpe in 2005, Schall found an institution in trouble. Enrollment had sunk to about 800 students, the discount rate was at 54 percent, and the university was running a $4.5-million deficit on an annual budget of $20 million. It was put on warning by its accreditor for financial instability. He asked the faculty to tear up their contract, left open positions unfilled, and cut some staff pay, among other cost-saving measures. “I did dramatic things early on, or we would have closed,” Schall says.

As Oglethorpe recovered, aided by Atlanta’s boomtown status, Schall kept the budget lean. The student-to-faculty ratio at the university is 16-to-1; at other private institutions, it may be more like 6-to-1. Schall has one assistant, not two or three. Carefully controlling the university’s growth has helped him control costs.

For a presentation he gave at a Council of Independent Colleges meeting, Schall highlighted a list of private colleges ranked by the amount of money they spend to educate each student. At the top of the list were elite institutions that spend $100,000 or more per student. “For the moment, they can afford to do this because they have endowments,” he says.

In the middle of the list lay a strata of colleges that spend $45,000 to $55,000 per student, “many of them name brands,” Schall says. Enrollment at some of those institutions has flattened or declined, “but they’re still spending what they spent per student, or more, as they did when they were healthy” and are running structural deficits as a result. In the end, it doesn’t matter what their discount rate is if they’re not bringing in enough money to cover what they spend. (Oglethorpe’s overall discount rate is about 60 percent.)

When Oglethorpe had 800 students, it spent about $40,000 per student per year. Now it enrolls more than 1,200 students and spends about $24,000 per student per year. Even with the university’s enrollment success, “if we were spending just $4,000 or $5,000 more per student, we’d be in deficit,” Schall says. The institution currently has a $4-million operating surplus.

Comment from the Chronicle survey

“Our biggest challenge is the middle-income student. We have to raise more money to meet more need for that demographic.”

Controlling costs comes with costs of its own. About 80 percent of classes at Oglethorpe are taught by tenured, tenure-track, or full-time contract faculty, but faculty are paid less than at some of its competitors. “That’s not an easy issue to manage, morale-wise, because everybody would like to be paid more,” Schall says. “But we’re doing eight tenure-track hires this year, which is a whole lot more hires than most schools our size.”

Schall stresses than none of what he did was easy. He arrived in the middle of a crisis, but at most colleges it’s going to be hard for incoming leaders to make big changes and survive. The bottom line remains the same. “You’ve got to align your expenses with your revenues on a sustainable basis, long-term,” he says. “If your overall net tuition is not climbing at 3 to 5 percent a year, you’re in trouble.”
SHIFTING PROGRAMS

For most of the 20th century, most colleges offered essentially the same academic programs. If you wanted to major in history or German, you could do so at the small liberal-arts college in your hometown or the public comprehensive university down the road, or at almost any other four-year institution in the country.

The 21st century has spawned new fields, new modes of learning, and new demands, and colleges are still adapting. Big Data needs analysts, and the connected world needs cybersecurity specialists to protect it. A huge wave of aging baby boomers is driving a desperate demand for health-care workers. For good or for ill, many humanities majors have lost luster for college students. Many students expect to be able to learn the way they do so many other things — online.

Adapting academic offerings to the 21st century and its students is not only critical to colleges’ continued relevance, it’s a linchpin of their survival — especially in the face of daunting enrollment challenges. Elite private institutions and state flagship universities might be able to afford to maintain majors that attract so few students that they qualify as boutique, but most institutions will have to try to make the most of their limited resources. In many cases, that will mean cutting other programs. “You don’t have more money to spend every year,” says Devereaux, the Goucher president. “You’re making choices.”

Colleges are adding new programs to the mix. About 47 percent of respondents to the Chronicle survey indicated that they had added new programs out of perceived demand over the past five years. But only about 39 percent said they planned to start new programs in the future.

If it were as simple as adding hot programs, there’d be little need for this report. But not every program is a good fit for every institution. Take, for example, health care. “I think right now you can’t go wrong [with health care] in the U.S. because the demand is enormous,” says Alexander, of Georgetown. “Every college in the U.S. right now could expand its medical stuff, and they would not suffer.”

But not every hot major fits every institution. Nursing programs, in particular, are expensive to start, and, due to the demand for instructors, expensive to staff, making them difficult for resource-strapped institutions to develop.

Some avenues that have proved successful for some universities may no longer be open. Institutions like Southern New Hampshire, Arizona State, and Western Governors Universities have built huge online enrollments by catering to working adults, while brand-name colleges offer online MBAs and other executive education. Any college that hopes to build an online empire now would be competing against institutions with well-established and well-funded programs, says Mitchell, the

Comment from the Chronicle survey

“Some institutions will get smaller, and it’s better to do so willingly, with a rightsized approach. I expect we will soon see more colleges and universities develop enrollment plans that call for smaller, not larger freshman classes, and these plans will require some strategic reallocation of institutional resources. Growth is no longer the singular answer to what ails higher education.”

“That’s quite a move for a liberal-arts college,” says Comerford, the president.

Some avenues that have proved successful for some universities may no longer be open. Institutions like Southern New Hampshire, Arizona State, and Western Governors Universities have built huge online enrollments by catering to working adults, while brand-name colleges offer online MBAs and other executive education. Any college that hopes to build an online empire now would be competing against institutions with well-established and well-funded programs, says Mitchell, the
consultant. “You’re going to get killed unless it’s local online programming for a particular program that reaches the work-force needs of a particular select region of the country.”

That doesn’t mean that online programs don’t matter. “As a surfer, I’ve realized you can’t catch a wave that’s past you,” says Casey, the McDaniel president. “We’re not going to be Southern New Hampshire University.” But McDaniel is building up its online programs because students expect it, especially for graduate education, and it does help with revenue.

But the fact remains that, as presidents are wont to say and many faculty members are loath to hear, “you can’t be all things to all people at all times in all ways,” says Casey. If a college has limited resources and wants to add

Comment from the Chronicle survey

“Every institution will need to find a balance of recruitment and retention as we enter the next 10 years. Not all institutions can grow. Some will find greater success flattening new student enrollment and focusing on retention and graduation.”
programs—and there are no rich donors in sight—it will probably have to eliminate or reduce others.

Cutting majors or entire programs—especially those that sit close to the heart of the traditional liberal arts—has raised outcry everywhere it’s been tried. At the University of Wisconsin at Stevens Point, a 2017 proposal to close 13 majors led to a vote of no-confidence in the president and provost by faculty and staff members. (The university announced in 2019 that no majors would be shuttered after all.) But with waning demand for many existing programs and limited resources to launch new ones, college leaders may feel they have no other choice.

About three years ago, McDaniel College began a strategic-planning process that involved reevaluating its operations. It looked at streamlining operations, and found a way to cut its annual energy bill by about $500,000. It looked at administrative efficiency, and cut a vice president position from the cabinet, among other moves. It looked at its curriculum, and a faculty committee examined data about courses and students and recommended that the college cut five majors. The subjects, including French, German, and music, “are critically important for the breadth of learning,” Casey says. “But there’s not a demand for people to be majoring in these things.”

The plan to end the majors, announced in early 2019, drew predictable outrage. “My head was on a stake,” Casey says. “Constituent groups were in rebellion—student groups, alumni groups, faculty. ‘Run him out of town on a rail. He’s destroying the liberal arts. Is this the end of our future?’ The controversy only dwindled when the college enrolled its largest ever class the following fall.

As planned, many of the cost savings from eliminating the majors will be diverted into eight new programs going through the process of approval, some of which were repackaged from existing majors to be more appealing for students. Mathematics, for example, will spin off actuarial science and applied mathematics, both of which will ideally feed a proposed master’s program in data analytics. Since nearly half of sociology majors were focusing on criminal justice, it made sense to create a criminal-justice major. “This is a generation of students that, fortunately or unfortunately, they want to see a major that looks like the name of the thing in life they want to do,” Casey says.

Cutting programs, like so many other things about running a college, must be handled with care. When José Antonio Bowen, the former president of Goucher, announced in 2018 that the college was cutting about a dozen majors, the resulting outrage was predictable. But some of the troubles that arose from the timing of the announcement took leaders at the college by surprise.

The mathematics major at Goucher had seen declining enrollment for many years, so it made sense to eliminate it. “The idea was to replace that with the new integrated data analytics,” says Devereaux, the president. The problem was that the math major wound down before the new program could be approved by the Maryland Higher Education Commission, which oversees policies for public and private colleges in the state. The analytics program is now up and running, and a new engineering science program is rolling out next fall, but “we had a year lag time,” Devereaux says. “That was a tactical mistake.”
Beyond the demographic data, the future for colleges is hard to predict, especially given some of the pressures now bearing down on academe.

The recent decision by the National Association for College Admission Counseling has raised the specter of colleges poaching enrolled students from other institutions. According to Pedersen, of Evergreen State, the chatter among his colleagues after the decision was that they will uphold the rescinded rules, “but at some point, somebody’s going to break ranks, and it’s going to be an administrator at a cash-strapped, tuition-driven place,” he says. “It’s just awful to think about, but it’s the time we’re in now.”

As enrollment challenges ramp up at many colleges, the pressure may mount to consider a merger, sale, or closure. Mitchell suggests that college leaders not panic if the possibility arises. After all, mergers and other similar arrangements are nothing new. As Mitchell notes, he was once the president of Washington & Jefferson College, and “that was a merger. The 19th century is full of stories of mergers.”

If the need to look for a merger or consider closure is even a remote possibility, it must be taken seriously, and prepared for — mentally and otherwise — as a possible outcome. “Usually when a college closes, the faculty say, We didn’t know. Well, why?” Mitchell says. Or the trustees say, We had no choice “but to do this because we’re fiduciary stewards of this place. Well, you should have known that five years ago.”

Public institutions have the nominal support of the state behind them, so they’re less likely to face such existential questions, though institutions in Georgia and Vermont have merged. But being an arm of the state can make it difficult for public colleges to adapt quickly. Take application-fee waivers. Pedersen, at Evergreen State, wanted to make it easier for lower-income students to apply by dropping the $50 fee. “Seems like a very simple topic to discuss and make strategic decisions about,” he says. But it turns out the fees are rooted in state legislative code, so he’s waiting for a review from the attorney general’s office.

While state governments can seem rigid and immovable, things can change quickly. Pedersen lauds Washington’s support for its public colleges, but adds, “we’re not fools.” A significant change in the governor’s mansion or the legislature, and the system could see the kind of deep cuts to state support that have roiled the University of Alaska system.

With all the uncertainty in the air, some colleges are betting that what has brought them this far will sustain them into the new century — with probable tweaks. The on-campus residential experience is “the heart of a place like Otterbein,” says Comerford, the president. “There is a bet that we’re making that there will continue to be demand from traditional-age students for that kind of experience.

“It is not the most efficient way to do education,” he adds. Small classes, tenured professors, and campus athletics “are all more expensive than putting a bunch of students in an online course. But we happen to think that, for the population we’re working with, it’s better.”

Comment from the Chronicle survey

“No shrinking middle class with a lack of access to discretionary income and/or the reluctance to pay, colleges and universities should be very sensitive to the contraction of available market share among students who are able to afford to pay for college. Tuition resets and/or tuition freezes are a good first step toward addressing this problem, but colleges should do more if they expect to regain market share.”
Advanced Cinematography is offered at Oglethorpe U., which raised enrollment by matching in-state tuition for applicants with good credentials.
Colleges that are planning for the demographic future in the next decade are not waiting to take action. They are taking steps now — analyzing student demand and changing their mix of academic programs, seeking out new student populations, and carefully tracking their costs.

What’s clear is that no one strategy will work wonders — most colleges will need several. As Scott Steinberg, vice president for university admissions at the University of New England, puts it: “One of the reasons for UNE’s recruitment and overall success is our diversified enrollment portfolio.”

In this next section, we examine how 10 colleges are trying a variety of strategies to get ahead of the enrollment crisis.
A Liberal-Arts College Adds Free Summer Courses and Lowers Its Tuition

Increasing enrollment in the Midwest is stunningly difficult,” says Lori E. Varlotta, president of Hiram College, located in a rural town between Cleveland and Youngstown. With just under 900 full-time undergraduates on a campus that could easily accommodate 1,250, the liberal-arts institution is “holding steady at a time when we need to increase,” she says. So Hiram has made another in a series of enrollments bets.

It had already branded a curriculum reorganization as “the New Liberal Arts” — it even trademarked the term — and then followed up with another trademarked program, “Tech and Trek,” which gave every student both an iPad Pro and a pair of hiking boots (the goal being “mindful” use of technology).

Next it announced a tuition reset, starting in 2020, from $37,710 to $24,500, allowing it to say Hiram is “one of the best-priced four-year private colleges within and beyond Ohio.” The college will further sweeten the deal by making two summer courses free for each student, eliminating $2,350 in mandatory fees, and — thanks to a generous trustee — offering paid, for-credit summer internships and research opportunities.

The latest changes, Varlotta says, are “based as much on augmentation of learning and career development as on tuition savings.” Or to put it another way: Students are worried about getting jobs after they graduate — and their parents are worried about that, too, in addition to being concerned about the soaring cost of higher education. For Hiram, emphasizing career preparation while cutting tuition 35 percent seemed like a good combination.

Varlotta says that the two free summer courses and the internship possibilities move Hiram toward offering a three-year degree, especially for students who come to the campus with Advanced Placement credits. For those not in a rush to graduate, the summer courses might let an athlete take a lighter course load during a busy sports season, or allow a theater major to spend extra time working on a show.

The college also hopes the summer offerings will help improve retention by keeping students who need summer courses on campus. Currently, some students take classes elsewhere — their local community colleges, for instance — and end up not returning to Hiram. Varlotta adds that students have told her the free summer courses will help them avoid “summer slide.”

Still, the tuition cut is the headline. “We did a lot of research on resets — 14 months’ worth,” says Varlotta. “We decided the current high-price/high-discount model is broken.” The sticker price
can intimidate families who have never sent a student off to college and have no experience with the complex financial-aid process. “We’re hoping that middle-class families will see a $24,500 sticker price and say, That’s pretty reasonable,” she says. “We didn’t want them to see our sticker price and immediately think, I can’t afford this private college.”

The tuition reset and other recent changes come after its lenders had forced Hiram to reduce costs significantly. Starting in 2014, the college began a series of cuts in administrative staff and then in the faculty — the latter after an intense self-study led by Judith Muyskens, the dean and vice president for academic affairs.

The faculty, Muyskens says, had been the right size for an institution of 1,100 or 1,200 undergraduates, but not for a college of 900. Plus, Hiram’s academic offerings were out of sync with students’ interests. After closely examining all the data it could find, Hiram cut 11 faculty positions and re-configured its curriculum, eliminating some majors and combining others, or making them minors — and affecting only 18 students.

But the college has also been adding programs in areas where it sees demand, such as sports management, integrated exercise science, criminal justice, and design. These have been folded into the traditional liberal-arts curriculum. “College presidents want the liberal arts to survive,” Varlotta says. “You have to figure out the both/and.”

She credits her cabinet members for proposing and honing the recent changes, and a five-member team of trustees for vetting them. But will the changes make a difference in a time of extraordinary competition for applicants? Varlotta says Hiram modeled the financial impacts of the tuition reset and additional offerings as well as it could, but since no other college she knew of had tried this combination of sticker-price cuts and program additions, the predictions involved a fair amount of guesswork.

“We’ve modeled it so the first few years are revenue-neutral,” she says. “Hopefully, through volume we’ll be revenue-positive in the second or third year. Hopefully, we’ll have more students.”
Maine’s Largest Private University Defies the Odds

N ot only is the University of New England located in the region of the country that’s being hit the hardest by the student demographic crunch, but it’s also in Maine, the state at the forefront of the crisis. Maine’s population of 1.3 million is the nation’s oldest, with a median age of 44.2; the national median is 37.7. The number of high-school graduates in the state is projected to continue to fall, by about 14 percent through 2032.

And yet UNE has been able to defy the odds and to grow, through a strategic mix of new or expanded programs and a focused online presence. With campuses in Biddeford and Portland, Maine; a campus in Tangier, Morocco; and a growing online division, the university has a total of 6,000 degree-seeking students. And in 2019, it welcomed one of the largest undergraduate classes in UNE history, with 817 incoming students, versus 749 the year before.

After a decade of growth, Maine’s largest private university was not struggling when James Herbert began his presidency in July 2017, but it was at “a natural plateau,” he says. “We did need to step back and decide what was next.”

Herbert sought to walk a tightrope between playing to the university’s core strengths, its health-profession programs — which include the only medical school and only dental school in Maine, a college of pharmacy, and a robust slate of undergraduate pre-health offerings — and building strategically on the other options the university could offer. “We had promoted ourselves as a health-sciences university,” he says, “and I found that narrative to be far too limiting.”

Herbert says he emphasized expanding the marine-science programs, a natural source of strength not least because the Biddeford campus’s marine-science center is located right by the Atlantic Ocean. UNE developed a marine-entrepreneurship program and a marine-affairs program to supplement its existing offerings and launched a new graduate program, a master’s degree in ocean food systems. Marine sciences are now the college’s most rapid area of growth, with enrollment more than doubling. “About five years ago on the undergraduate side, we enrolled 44 new students,” says Scott Steinberg, vice president for university admissions. “This year we enrolled 102.” The new master’s program enrolls nine students.

Likewise, says Herbert, UNE is experiencing growth in established programs such as business, animal behavior, and neuroscience.

Distinctiveness is key in all of these programs, says Herbert. “We need to build on our assets, but also to look where the market is.” In his first address to the faculty, Herbert issued a challenge to members of each campus program to define who they were, to delineate how they were distinctive relative to their biggest competitors — and if they weren’t, to describe how
they planned to become distinctive.

The online division has been another factor in UNE’s growth. “One of the reasons for UNE’s recruitment and overall success is our diversified enrollment portfolio,” says Steinberg. In addition to the undergraduate and graduate campus, there is the graduate online division, which comprises six core degree programs, four certificate programs, and a health-sciences prerequisite program.

UNE does online differently than many places, according to Herbert. “The last thing we want to do is just launch a generic MBA program,” he says. “We want to be sure it’s something we can do really well. We’re not going to be able to compete on price point, with the lowest-priced places out there online. We have to have concierge service, provide an excellent product, and we have to have a product that is in a niche, that the market really needs.”

With online students constituting about 30 percent of its total degree-seeking student enrollment (there are 1,769 degree-seeking students in its online programs, with an additional 2,066 non-degree online students), the university is looking into other new online offerings. “You always have to be bringing something new to the market,” Herbert says. “We’ve organized our online offerings in a way that allows us to ramp them up fairly quickly, and likewise to bring them down fairly quickly if need be.”

Looking ahead, Herbert says, that spirit of curricular nimbleness and message of distinctiveness will allow UNE to keep growing and draw from a wider geographic area. Ten years ago, 70 percent of UNE’s undergraduate students came from Maine, and 30 percent came from elsewhere — or “away,” as Mainers like to say. Now, says Herbert, it’s 27 percent from Maine, and 73 percent from elsewhere — and while the biggest percentage of those students are from New England, the university is increasingly attracting students from the Mid-Atlantic region.

Herbert says he was encouraged by the size of this year’s class, but “that one data point does not make a trend. I’m optimistic, and I think it’s likely to continue, but we’re not resting on our laurels.”
Florida’s Oldest Roman Catholic University Aims Big

Located 30 minutes north of Tampa in Pasco County, Fla., Saint Leo University has a 186-acre campus dotted with palm trees and mission-style buildings, home to 21 percent of its student body. The other 79 percent is either online or in more than 30 education centers, located on military bases, at state colleges, or as stand-alone campuses in seven states. An early player in online education, Saint Leo started its program in 1998 and now offers more than 40 online programs. The university’s total enrollment, including all of these divisions, is almost 20,000.

But when Jeffrey D. Senese became president of the 130-year old college in 2018, on-campus enrollment was declining, and international-student enrollment, while stable, comprised mainly athletes.
Hoping to turn things around, Senese brought Senthil Kumar on board — the two had worked together a decade earlier at Johnson & Wales University — to oversee both international-student and campus enrollment. Over lunch at a local restaurant, Senese shared some campus enrollment numbers with Kumar, who responded, “We can blow these out of the park.” He scribbled down his projections for the next few years on a napkin, including a prediction for 2019: He wanted to reach for 1,000 new students.

Kumar, now the vice president for university campus enrollment management, admits that his ambition was initially met with some skepticism on campus, from the enrollment team to the faculty to the accounting department. “But I said, ‘It’s doable. We just have to change the culture. We’ve got to be student-centric.’”

In August 2019, Saint Leo welcomed to campus the biggest class in its history: Eight hundred and fifteen new freshmen and 186 transfer students — for a total of 1,001. That’s a 45-percent increase over the previous year, which had a total of 690 students.

That napkin with the scribbled projections? Kumar is planning to frame it. The university was able to meet its goal, says Kumar, by delivering Saint Leo’s message of “affordability, accessibility, and acceleration.”

To help families understand campus financing options, they began throwing Fafsa Nights at various locations throughout the region — open not just to students applying to Saint Leo but to all. Kumar’s team also reached out to families whose students had completed 90 to 95 percent of their Fafsa filings — normally an unfinished Fafsa application just results in an email reminder — and walked them through completion.

Saint Leo offered several new scholarships, including a 50-percent tuition discount to students who had earned an associate degree. And the university also gave out “microscholarships.” Students could earn $250 toward their Saint Leo tuition by attending an admissions event — say an Open House or Admitted Students Day — and could earn $1,000 by attending four admissions events. Sixty percent of students who enrolled in 2019 came to at least one of these events.

Additionally, the admissions office began to educate students and their families about pathways to get through Saint Leo quickly — by focusing on opportunities like dual-enrollment programs and the CLEP program, which is run by the College Board and allows students to earn up to 40 college credits by passing exams on college-level knowledge. And the university’s 3 + 1 Accelerated Degree program, says Kumar, enables qualified students to obtain their undergraduate and master’s degree in just four years.

Another key strategy, says Kumar, was having Saint Leo adopt a test-optimal policy and shift its admissions policy to focus on unweighted GPA and AP scores. “Many institutions use the weighted GPAs, which include bumps for Honors and AP courses, regardless of student performance in the class,” he says. “We moved to unweighted GPAs to allow full accessibility for all students to attend Saint Leo.”

Finally, Saint Leo also saw a rise in international students, from 86 in 2018 to 181. In 2019, the university opened offices in Beijing, Ho Chi Minh City, and Mumbai to help with student recruitment, and it partners with EducationUSA, a State Department network of international advising centers. Saint Leo will also match government scholarships, making tuition more affordable for international students. Saint Leo’s Bridge Program is another asset, enabling international students to get their degrees in four years by allowing them to incorporate their English-language requirements as electives toward their degrees, rather than by tacking on additional time in a separate program.

Looking ahead, President Senese says he wants to expand every division — online, the centers, and campus enrollment, which now stands at about 2,300 students. He and Kumar are shooting for 4,000 to 4,500 students on campus by 2024. Senese is not shy about stating his ambitions for his institution: “The biggest Catholic institution is DePaul. I want to beat them. I want to be able to say we’re the biggest Catholic university in the United States.”
A Pennsylvania State University Bucks the Trend

Stratégy:
Sharply expand the number of undergraduate and graduate programs to raise enrollment

Slippery Rock University, which affectionately goes by the name “The Rock,” is one of the few campuses in the Pennsylvania State System of Higher Education that haven’t seen a major enrollment drop in recent years. It has certainly faced challenges, like many other public universities in the Northeast — most importantly, diminishing state support and shrinking numbers of high-school seniors. And it has the added disadvantage of being located in a rural area 50 miles north of Pittsburgh.

The number of high-school seniors in the region started decreasing in 2011, and after 10 years of gains, Slippery Rock started seeing its enrollment slip, says Amanda Yale, the chief enrollment management officer. In 2010, its total undergraduate and graduate enrollment was 8,852. By 2013, it had dropped to 8,347.

“We had a dip, and we said, We’ve got to turn this around because high-school demographics are not changing,” Yale says. “This was not new to us, because in the 1990s, we turned around a nine-year enrollment decline to 10 years of enrollment progress. But we also weren’t fighting the demographics then.”

The effort to reverse the trend began under one president — Cheryl J. Norton, who served from 2012 to 2017 — and continued under her successor, William J. Behre. The university concluded that the answer was to go after new markets, especially in its graduate programs. That meant expanding its academic portfolio.

It put in place 24 new undergraduate and graduate programs in a six-year period, which “is unheard of at a school of our size,” Yale says. It also moved some courses from traditional classrooms to online.

The efforts worked. The number of students is almost back to the 2010 level, with a total enrollment of 8,806 in 2019.

“We took a really hard look at our
undergraduate and graduate program offerings,” Yale says. “We did market research in western Pennsylvania, because as a regional institution, we were looking to provide back to our constituency. Based on that we decided on this portfolio of programs.”

Three of the new offerings are accelerated pre-professional programs — physical therapy, physician assistant, and occupational therapy — that allow students to earn an undergraduate and master’s degree in a total of five or six years. In 2017 Slippery Rock also started offering four engineering programs; it had never offered that field before.

While many of the new undergraduate programs focus on aspects of security, marketing, or wellness, the university also will, for the first time, offer a bachelor’s in musical theater, because a planned performing arts center was set to open on campus in 2020.

Master’s programs including accountancy, music therapy, and health informatics are now available to students, and the university added doctoral degrees in special education, occupational therapy, and physical therapy, with one in educational leadership and administration to start next year.

“Six years ago, we had 24 graduate programs and now we have 40,” Yale says. The funding for the new programs, she says, came from resource reallocation and faculty retirements. Since 2012 the population of part-time and full-time faculty has grown from 433 to 488, she adds.

The number of graduate students has increased by 91 percent, from a 10-year low of 699 in 2012 to 1,338 in 2019. And in 2017, Slippery Rock had a record-high enrollment of freshmen — 1,597. Over the past two years, there have been small declines, with 1,580 first-year students entering in 2019. Some 37 percent of the new freshmen are first-generation college students, and 34 percent are eligible for Pell Grants.

Besides attracting new students while other universities are struggling to stem their losses, the new programs are also strengthening Slippery Rock’s brand, Yale says. The institution was founded as Slippery Rock State Normal School, and it was long known as a teacher’s college. Now that reputation is shifting.

Twenty years ago, most Slippery Rock students were in the College of Education, Yale says. “Now it’s the College of Health, Engineering and Science,” where almost half of all incoming freshmen are enrolled.

Retention is also a major focus; the freshman retention rate in 2018 was a record 83 percent — 18 percent higher than it was 20 years ago. And the four-year graduation rate since then has more than doubled to 55 percent over that same time period.

About 800 to 850 of the students at Slippery Rock are transfers, a number university officials would love to increase. Besides partnering with local community colleges, about five years ago the university started offering financial aid for transfers.

Yale says her hope is that the university will continue to see small increases in student enrollment, but “it’s not going to be dramatic. The key is to hold steady. It isn’t just about the freshmen, or the graduates, or the transfers. It’s all of them together.”
Massachusetts Campus Banks on Graduate and International Students

The sweatshirts in the bookstore still say Lasell College, and only one of the red brick signs at the entrance to campus has been replaced, but Lasell College is now officially Lasell University.

The change in status, which took effect in August of 2019, makes the one-time women’s seminary the latest in a string of Massachusetts institutions that have traded “college” for “university” in the hopes of attracting the international and graduate students they’ll need to survive an ongoing decline in the number of high-school graduates.

In China and parts of Europe and the Middle East, the “university” label conveys greater prestige than “college,” says Ben Waxman, the CEO of Intead, a company that helps colleges with global branding. “The term ‘college’ suggests vocational, profession-specific schools,” he says, “but ‘university’ translates directly. Boston University is the same as Beijing University. Everybody gets that.”

At Lasell, where roughly 7 percent of undergraduates and 12 percent of graduate students are international, the president, Michael Alexander, hopes the move will help the college retain more of them. He estimates that the college loses about 40 percent of its international students to universities in Boston and elsewhere each year.

The “university” name could also carry more weight with online graduate students in other states who aren’t familiar with the regional institution, Alexander says. His goal is to grow graduate student enrollment from 500 students to 700 by 2022.

Compared with many of its private-college peers, Lasell is doing quite well. Since Alexander took office in 2007, overall enrollment has increased by 50 percent, from 1,400 to 2,100, and the budget has more than doubled, from $35 million to $89 million. “Our investment in the graduate- and professional-studies program has been a driving force in Lasell’s growth along with the expanded undergraduate academic offerings, specifically in the sciences,” he says.

The campus sits on 53 acres in one of Boston’s priciest suburbs, on land that the real-estate blog Bisnow valued at $202 million. But prime real estate wasn’t enough to save neighboring Mount Ida and Newbury Colleges, which closed their doors in 2018 and 2019, and Alexander says it would be “silly to not be worried about undergraduate enrollment” going forward.

Between 2013 and 2032, the number of students graduating from Massachusetts high schools is expected to fall by nearly 10,000, mirroring a trend that will be seen throughout New England, accord-
According to the Western Interstate Commission for Higher Education. The most precipitous drop is coming after 2025.

Massachusetts, which boasts a disproportionate number of colleges for a state its size, is likely to be seriously affected by the coming crisis. Already, in a span of just three years, seven colleges in Massachusetts have shut down or merged with larger institutions, including Wheelock College, which is now part of Boston University.

Colleges like Lasell see growth in their graduate- and international-student populations as the key to offsetting the inevitable decline in traditional-age students in their regions. Still, there’s no evidence that simply substituting “university” for “college” guarantees enrollment growth. Over the past 11 years in Massachusetts, private colleges Bay Path, Bentley, and Western New England have all made the switch to university status; only one — Bay Path — has seen a significant uptick in students, with graduate-student enrollment up by 50 percent and undergraduate enrollment up by a third, according to figures reported to the U.S. Education Department.

Lasell isn’t staking its future solely on a name change. Alexander, who comes from a corporate background, has been taking steps to make the college more affordable for students since he became its president over a decade ago. The latest innovation is “Lasell Works,” a hybrid career-preparation course that lets students lower their tuition over four years by $22,000 to $38,000. This year, 105 freshmen signed up for the program.

Alexander has also forged an agreement with Encore Boston Harbor, the new casino on the Mystic riverfront, to educate its employees on site.

Lasell’s Newton campus will continue to look and feel like a liberal-arts college, with white and green houses that were built in the 1800s, when Lasell University was still a women’s seminary.

Alexander said a few older alumni were worried that the college would lose its identity in the move to a university, but more recent graduates were enthusiastic about the change. “The young alums are changing their résumés,” he said. “They think it enhances the value of their degree.”
A Historically Black College Reimagines Itself

In 2017, Benedict College, a historically black institution in Columbia, S.C., was facing a 21-percent enrollment drop since its peak of 3,000 students in 2011. Enrollment was at a low point in 2017, at just under 2,100.

The drop in enrollment was largely due to the U.S. Department of Education’s decision to tighten credit standards for parent PLUS Loans, a decision that hit HBCUs particularly hard and caused enrollments to plummet, especially of first-year students.

Benedict was facing other problems as well: Its “SEE policy,” for Success Equals Effort, which allowed a student to earn a C grade for simply showing up to class, “created an image of Benedict College as a place that didn’t have academic rigor,” says Emmanuel Lalande, vice president for enrollment management.

But in 2017, with the arrival of Roslyn Clark Artis as president, the SEE policy was eliminated, as was open enrollment. Now students, who are largely first-generation and low-income, need a 2.0 GPA and a 17 on the ACT or 850 on the SAT to be accepted.

“It’s not Harvard, but we’re creating more academic rigor,” says Lalande, who joined the college in 2018 from Florida Memorial University. But Benedict still wanted to be true to its mission to be accessible, so it created a summer “bridge” program, to help those who had applied but whose scores fell below the cut-off. The program allows them to live on campus, take two courses for credit, and receive strong support to prepare for their freshman year. If they pass the courses, they will be accepted for the fall term.

Benedict also lowered its tuition and fees from about $30,000 to $22,840 for the fall of 2018 and $23,080 for the fall of 2019. Its tuition-discount rate had been close to 32 percent, and “students weren’t paying their bills,” Lalande says. The lower tuition rate includes all textbooks, which was not the case in the past.

The change has made the college more financially stable because students are now required to pay their tuition up front; before the new policy, many students who were enrolled couldn’t pay their bills and owed thousands of dollars to the college. Now Benedict receives more tuition revenue than in the past and can reinvest it into scholarships, Lalande says.

And in another big shift, Benedict revamped its curriculum, getting rid of five majors, ones that few students took or that didn’t lead to jobs out of college. That included religion, which was controversial, Lalande says, given that Benedict is Baptist-affiliated. But the goal was to focus resources and strengthen STEM majors.

With financial assistance from the United Negro College Fund, it has also started its Career Pathways Initiative and Service-Learning Program, to help students be ready for careers upon graduation. These changes are having the desired effect. Applications were up to 8,000 for 2019, a 25-percent increase over the previous three years, and the college welcomed 750 freshmen, its largest first-year class since 2012, Lalande says. And there are not
just more students, but more who are academically successful. The average GPA of the incoming freshman class was 3.1 for 2019, compared with 2.7 in past years. ACT and SAT scores were also higher.

The retention rate has also improved, from about 53 percent before 2017 to 56 percent in 2019, with the goal of 60 percent, with help from a newly hired director of student retention. The graduation rate had remained static at 32 percent in 2019, but Lalande says that was because the new policies had been in place only two years.

In 2019, the American Council on Education and Fidelity Investments gave Benedict, along with the University of South Florida, their Award for Institutional Transformation.

The college’s major admissions revisions and new curriculum were just the beginning. Benedict had to reintroduce itself to South Carolina, which “takes time if the last thing they remember is the SEE policy and that we’re not strong in academics,” Lalande says.

Over the past few years, he has invited school superintendents, guidance counselors, and principals to campus to hear what they thought of Benedict and familiarize them with its changes. The college has upped its recruitment efforts, visiting more high schools and talking to sophomores and juniors, rather than focusing primarily on seniors.

It has also sought to increase transfers, as well as out-of-state students, who make up about 40 percent of the student body, by partnering with organizations around the country that prepare high-school students for higher education. And the college strengthened its ties to the Bahamas, where many of its international students come from.

Just as importantly, the college worked hard on improving its customer service, something Lalande says was sorely lacking. “It’s hard to imagine, but we didn’t have a way to make an online payment,” he says. “We didn’t have technology that was working to our advantage. It may not seem innovative, but for Benedict it was. We needed to get into the 21st century.”

Homecoming festivities this year brought out students at Benedict College, where higher standards and lower tuition have resulted in more financial stability.
A Small University Bets on Enrollment Growth to Keep Its Finances Strong

Lawrence M. Schall is a bottom-line guy. As president of Oglethorpe University, in Atlanta, he has focused on costs and net revenue — specifically, cost per student and net revenue per student, at Oglethorpe as well as at colleges he compares Oglethorpe with. And as expenses inevitably increase, Schall sees enrollment growth as the only way to stay ahead.

“When your expenses are going up 2.5 or 3 percent a year, your revenue has got to outstrip that,” he says. “With the stagnation of family income, and discounting the way it is, if you’re raising tuition 4 percent a year, you’re netting half of that. So you’re going to have to grow.”

In Oglethorpe’s case, most of the growth is in traditional undergraduates. When Schall took office, in 2005, the university had about 800 students total, including 168 freshmen; in 2019, it brought in 400 first-year students, up from 330 in 2018. The fall 2019 head count, he says, is 1,385, and there are just seven empty beds in the residence halls. “The demographics in the South are better than they are anywhere else,” he notes, and Oglethorpe attracts a diverse population of students — more than a third Pell-eligible, 24 percent African American, and 14 percent Hispanic.

“We’re trying to project next year,” he says. “We think we’ll have 80 more students, with 60 of those living on...
campus. We can lease apartments. We’ve got some doubles that could be triples. And we’re also looking at taking a cohort of honor students abroad for the first semester.” Flying 24 students to Rome could help the housing crunch and at the same time be a handy marketing tool.

But it won’t be Oglethorpe’s only marketing tool. Several years ago, the university began inviting some 300 applicants a year to spring Scholarship Weekends loaded with seminars, interviews, and auditions — and with a promise: “All students who participate will receive a renewable, annual merit award of at least $18,000.” That helped ensure that admitted students actually enrolled.

In 2018, Schall’s team added a scholarship program it called the Flagship 50: For first-time students with good high-school grades and standardized-test scores, Oglethorpe will match in-state tuition at the flagship public university in the student’s home state.

Flagship 50 earned Oglethorpe national attention — and, perhaps not surprisingly, some imitators. But it also succeeded in bringing in additional students with good academic credentials. Of the 70-student increase in first-year enrollment in the fall of 2019, the Flagship 50 program brought 45, says Schall. “People asked me last year what I was hoping for, and I was like, ‘20, 30, 40,’” he says. “Forty-five was higher than any number I would have said.”

Financially, Flagship 50 was somewhat risky. About three-quarters of Oglethorpe’s students are from Georgia, where in-state tuition at the University of Georgia is about $12,000. “Our average net tuition per student is on the order of $13,000, so that cost us a little bit of money,” says Schall. But he was relieved when the university wasn’t overwhelmed with applicants from neighboring Florida, where in-state tuition is around $7,000.

The university’s discount rate went up about 1 percent, to 60 percent, Schall says. “Our freshman class grew 21 percent, and net tuition from our freshman class grew 16 percent. It cost us a little money per student, but brought in a lot of the right kids and brought a lot of extra net tuition.”

Other enrollment bets the university has made haven’t paid off as well, Schall notes. “We made a pretty big play to build our international-student population starting two years ago. We thought we were going to see an additional 40 international kids a year. And this year I think we had 10.” He blames a “skyrocketing” rate of visa denials, plus news reports about gun violence. “Mass shootings hit the international press in a big way. Parents feel like it’s happening every week.”

Schall plans on leaving Oglethorpe at the end of the 2019-20 academic year, and he says the challenge for his successor will be finding a way for the university to maintain the current rate of growth, and, if it can, accommodating the additional students.

“But you’re going to have to grow, because your revenue is going to have to grow,” he says. “I don’t foresee a day when we’re like, ‘OK, we’ve hit the number.”
A Small Women’s College Admitted Men — and Enrollment Climbed

Wilson College had been saved once before — in 1979, when the Board of Trustees voted to close the central Pennsylvania institution, and alumnae filed a lawsuit that succeeded in keeping it open. But by 2012, Wilson’s traditional undergraduate College for Women had only 316 students. Total enrollment, including coed adult-degree and graduate programs, was just 695. The college was running a deficit of $3 million a year, and deferred-maintenance problems had closed the library and the swimming pool.

Barbara K. Mistick, the former president of Pittsburgh’s public-library system, had been Wilson’s president for a year, and she did what some alumnae thought unthinkable: She created a 23-member Commission on Shaping the Future of Wilson College and told its members that “everything’s on the table” — including admitting men.

After studying reams of data and debating for months, the commission recommended not only welcoming male undergraduates but also cutting tuition by $5,000, starting a high-profile loan-buy-back program, and creating new offerings in the health sciences and other career-oriented disciplines. The goal was to have 1,500 students by 2020.

By the fall of 2019, though, Wilson had an enrollment of 1,620, including 662 traditional undergraduates. Mistick, who left Wilson in June 2019 to become president of the National Association of Independent Colleges and Universities, says the most important advice she can give any institution is simple: “You’ve gotta know your market.”

“I can’t tell you how many people said, when I came here, ‘Oh, yeah, Wilson — that’s that college for rich girls down the road,’” says Mistick. “We hadn’t been that college since the 60s, probably, maybe since the 50s.” Now more than 40 percent of Wilson’s students are Pell-eligible, and about the same proportion are the first in their families to attend college. “Our families are middle-income families and lower-middle-income families. We’ve really seen a shift in the market that we serve.”

So the college lopped $5,000 off its tuition, which was $28,745 in 2012-13 (it’s $24,450 for 2019-20). “Talk about an interesting conversation to have among presidents!” says Mistick. Some think a tuition reset is a good idea, but others insist that price and prestige continue to be linked.

“What I can tell you is that our market really was looking for value. If you look at the survey data that’s starting to come out now, more-affordable colleges are trending higher in the selection process for fami-
lies that are looking. They’re saying a four-year degree is really important, but I’d like to look at a place that’s more affordable. We wanted to put ourselves in that space.”

Wilson has also tried hard to match its curricular offerings to demand, such as by adding a nursing program that now has as many students as the college’s longtime veterinary-education program. “You’ve got to be market-responsive,” Mistick says. “I know faculty feel beaten up because there aren’t more students in the humanities, but students are middle income and their parents are worried about jobs, and they’re worried about jobs, and they’re worried about paying down their debt after college.”

The college’s revised curriculum, she says, still emphasizes liberal-arts skills like communication, creativity, problem solving, and how to be a lifelong learner. “But today we’re probably talking about those things as workplace skills,” says Mistick. “That’s resonating with parents, and it’s resonating with students.”

As for admitting men, that infuriated some Wilson alumnae, even though surveys had shown repeatedly that only a small proportion of today’s high-school women would consider a single-sex college. Wilson’s consultants had predicted, however, that admitting men would actually increase enrollment among women, a forecast that turns out to have been correct: In the fall of 2019, 533 women and 129 men were enrolled as traditional undergraduates.
A Faith-Based College Turns to Online Graduate Programs and Sees Huge Growth

A few years ago, the University of the Cumberlands was a small residential college for low-income students from Appalachia. Then the 2008 recession hit, bringing widespread job losses to the region.

The lost income left applicants needier than ever, forcing the Christian college in Kentucky to discount tuition even more deeply than it always had. The future didn’t look much brighter, with forecasts predicting a decline in the number of high-school graduates nationwide.

To survive, Cumberlands, like many of its private-college peers, would have to find a way to raise new revenue.

So in 2011, the university created an online graduate program. Today, close to 12,000 online learners, most of them in graduate programs, subsidize the roughly 1,400 undergraduates who study in the campus’s traditional red-brick buildings.

The online move has made Cumberlands, which was founded by Baptist ministers in 1888, the fastest-growing doctoral private nonprofit institution in the country. In the decade from 2007 to 2017, Cumberlands’s enrollment grew 350 percent. That is still well behind the growth rates of Southern New Hampshire and Western Governors Universities, which ranked first and second among master’s private nonprofit institutions and were the fastest-growing over all.

Other Christian colleges have seen similarly sharp gains. Indeed, half the institutions that cracked this year’s list of the 20 fastest-growing private nonprofit colleges with at least 5,000 students in 2017 identify as faith-based campuses.

They got there by different means, including adding academic programs and expanding recruiting.

Faith-based institutions that are focused on undergraduates face steep challenges. The number of students graduating from American high schools is expected to drop after 2025, while the share of students identifying as religious is shrinking.

“We wanted to get to a cost point that was not a deterrent for the traditional population to pursue a degree.”

Many Christian colleges already feel the pinch. In the latest survey by the
Council for Christian Colleges and Universities, more than half of its member colleges that responded reported declines in traditional undergraduate enrollments in 2017-18. Meanwhile, the median unfunded discount rate at the surveyed institutions increased to 43.3 percent from 29.6 percent a decade earlier.

To offset those trends, some faith-based colleges are turning to online graduate education, as the University of the Cumberlands has. From 2012 to 2017, the number of graduate students enrolled exclusively in distance education at religiously affiliated colleges increased by 55 percent.

Online education extends colleges’ geographic reach and could help insulate them against a decline in traditional-age undergraduates, says Philip Truscott, who recently interviewed officials at some of the fastest-growing Christian colleges for an article for the council’s magazine.

“The more they can tap into an older age group, the less they’ll face demographic challenges,” says Truscott, an associate professor of sociology at Southwest Baptist University, in Missouri.

That has proved true at Cumberlands, whose online program has done so well that the institution plans to reduce its undergraduate residential tuition by more than half this fall, from $23,000 to $9,875.

Jerry Jackson, the university’s vice president for enrollment and communications, says he hopes the tuition reset will encourage students who were planning to work, or to study at a two-year college, to consider Cumberlands. “We wanted to get to a cost point that was not a deterrent for the traditional population to pursue a degree,” he says.

So far the tuition reduction has exceeded expectations. This fall the university enrolled 875 new on-campus students, compared with 520 new students in fall of 2018.

But there are other paths to sustainability, too. Among the half dozen fast-growing colleges studied by Truscott, two changed locations, two added football teams, and several created new academic programs or core curricula.

California Baptist University, which grew 163 percent over a decade, added new programs in high-demand fields like nursing, engineering, and aviation science, while starting an online degree-completion program, says Mark Wyatt, its vice president for marketing and communication.

Colorado Christian University, which grew 244 percent, has forged relationships with more than 400 high schools, most of them Christian. More than a third of those high schools offer courses through the university’s dual-enrollment program, which has close to 5,000 students.

Some Christian colleges have taken steps to become more welcoming to students of different faiths and ethnicities, including expanding outreach to the fast-growing Latino community. Cumberlands recently broke ties with the Kentucky Conference of the Southern Baptist Convention but still considers itself a faith-based institution. Andrew Powell, the university’s director of communications and marketing, says Cumberlands wanted to include members of other faiths on its Board of Trustees, which the church wouldn’t allow.

“We’re seeing growth in students of all faiths,” he says. “From a marketing perspective, we don’t want to be seen as of one faith only.”

Though a majority of Cumberlands’ students now study online, its leafy campus will always be part of its identity, Powell says. And its growing number of online learners seem to appreciate that. When they pass signs for the campus along I-75, they’ll pull off, snap a selfie, and post it to social media, he says.

Some students “like to be tied to a brick-and-mortar institution,” he says. “They want online delivery, but the security and history we bring.”
A Midwestern University Plans for ‘the Cliff’

Missouri State University at Springfield has enrollment numbers many other institutions would envy. It has grown in 20 of the past 22 years; in 2019 it enrolled 24,126 students. That’s particularly good considering that a few years ago, the number of the state’s high-school graduates dipped — and is projected to remain flat until 2025.

Then the real crisis comes. After 2025, the college-age cohort in Missouri will see a distinct downward demographic trend. “We call it the cliff,” says Rob Hornberger, the university’s associate vice president for enrollment management and services.

While the university did see a 1-percent drop in overall enrollment from 2018 to 2019, that small number masked some steeper declines: a 13-percent reduction in freshmen and a 7-percent decrease in transfer students, attributable to a 20-percent drop in the state’s community-college enrollment over the past five years, Hornberger says.

But the university made up for those losses with a growing number of dual-credit students, as well as a bump in graduate students. Expanding that pool of dual-credit students will be a major focus of the strategic enrollment-management plan Missouri State is developing in the 2019-20 academic year.

That push has been largely successful. Despite a few dips over the past two years, the number of dual-credit students grew from fewer than 1,800 in 2011 to almost 3,500 in 2019, Hornberger says. Dual-credit students now make up 14 percent of the total student population, compared with 8.5 percent eight years ago, he adds.

Over the past two years, dual-credit enrollment “has become more of a strategy by the university to level out the loss of enrollment in other categories,” Hornberger says. “We also see it as an opportunity to connect with students at an earlier point so they consider Missouri State as their college of choice.”

The university now partners with about 135 high schools, he says, offering 85 courses, and has the second-largest number of dual-credit courses in the state after the University of Missouri at St. Louis.

According to state law, high-school teachers who meet certain standards, including having a master’s degree, are allowed to teach college courses in high school. The upside is that students earn high-school and college credit simultaneously, and the university and high schools share the tuition students pay for the courses.

A downside is that dual-credit students don’t bring in as much money as undergraduates. University tuition for in-state undergraduates is $218 per credit hour, compared with $70 per credit for high-school students. But the hope is that ultimately those high-school students will move from dual-enrollment to full-time undergraduates at Missouri State, Hornberger says. In fall 2019, 17.5
percent of new students had taken dual-credit courses from Missouri State, up from 12 percent in 2011.

And, he says, another goal, besides raising enrollment, is broadening access to higher education to as many high-school students as possible, by providing resources to take college classes.

While Missouri State’s dual-credit courses used to be limited to general education, such as writing, algebra, and chemistry, “we’re now expanding, as more academic departments on campus are interested in making their courses available,” he adds.

For example, the university now offers a dual-credit agriculture class at a local high school. The high school has adopted only that one course, Hornberger says, but “that gives us a foot in the door to build a relationship with them and possibly get other classes offered at the school as well.”

In the fall of 2019, Missouri State also began offering six free credits of dual-credit courses to students in Springfield public schools who are eligible for free or reduced school lunches and have at least a 3.0 GPA; about 100 students have taken advantage of that so far. In 2020, the university is expanding the offer to other parts of the state.

As Missouri State’s enrollment has grown over the years, so have its graduation and retention rates. Its retention rate between first and second years is 78 percent, compared with 75 percent five years ago, and its four-year graduation rate is 38 percent, compared with 31 percent for the graduating class of 2015. Its six-year graduation rate is 56 percent.

The university is also focusing on raising its number of graduate students; over the past five years, it has added 50 new graduate programs. Most of the programs offer certificates aimed at meeting work-force demands. But high-demand degrees, such as a master’s in occupational therapy and the Doctor of Nurse Anesthesia Practice, are also helping boost the number of graduate students by almost 3 percent in 2019 over 2018, to 3,815 students, Hornberger says — its largest graduate-student enrollment ever.
Enrollment Experts Speak Out

Those on the front line discuss strategies, fears, and the future

This section offers analysis, advice, and a look at some of the practical steps that colleges are taking to maintain or shore up enrollment. Since the enrollment crunch affects institutions and geographic regions in different ways, we’ve provided a cross-section of views.

One strategy that won’t work: Relying on the same old, same old.

“Change in higher education moves at a snail’s pace, but this crisis requires expediency,” says Angel B. Pérez, vice president for enrollment and student success at Trinity College, in Connecticut. “The colleges that will thrive in the decades ahead are those willing to take risks while keeping their mission and history at the core of every decision they make.”
Question: Who do you think made the following observation — and when?

“Even more alarming is the perception among a growing number of young people today that, with escalating college costs and diminishing payoffs in terms of guaranteed career opportunities, a postsecondary education simply may not be worth the huge investment.”

If you guessed that I pulled this from a magazine article published in the past couple of years, you wouldn’t be alone. Point of fact: The above statement was made by Jack Maguire in Boston College Magazine … in 1976.

For those of us who have been doing admissions work for a while — I’ve been in the business since 1980 — to hear some form of Maguire’s concern today just seems like déjà vu all over again. The 1980s were quickly dubbed the “demographic decade” as high-school graduation rates declined and a stubborn recession pressed family pocketbooks. In fact, Maguire is widely acknowledged as the father of enrollment management, the science that would be called upon to relieve higher education’s enrollment pressures at the time.

The two decades that followed saw ebbs and flows in high-school graduation rates and an inexorable increase in the sticker price of college. Yet with each demographic blip, and with every crossing of a new are-you-kidding-me? threshold for cost of attendance, colleges still reported record selectivity, robust enrollments, and financial-aid programs that, for some, effectively reduced sticker shock. Indeed, reports of a higher-education bubble about to burst appeared to be greatly exaggerated. American higher education seemingly had an elasticity that could withstand periodic, short-term fluctuations in demand and cost.

Then came 2008. The Great Recession devastated university endowments, shattered the majority of family wealth and income, and confounded the predictive modeling of enrollment managers. The near-term chaos was very real. Somehow, at varying rates, most colleges managed to survive, but in order to do so they established a “new normal” that would allow them to claim renewed stability for the long haul. That brings us to the summer of 2019, when the cracks in this new normal really started to show.

As has been the case in recent years, Bucknell University had a large and talented applicant pool for the Class of 2023. Setting an aggressive target of 980 (40 more first-year students than in 2017), our yield model indicated that our admit pool, plus 30 to 35 students enrolled from the wait list, would safely land us there by the first day of fall classes. That all changed on May 2. The enrollment-deposit spigot went dry, considerably short of our goal. As it turned out, we would need to enroll about

“Things Are Only Going to Get Worse”

Bill Conley

Bill Conley
100 students from our wait list.

In the process of calling these wait-listed applicants, we learned that Bucknell was hardly alone in its shortfall. Up and down the selectivity ladder, especially among private colleges, yield models had been invalidated by a sea change in college-choice behavior. After the May 1 deadline for candidates to accept or reject admissions offers, the National Association for College Admission Counseling (NACAC) provides colleges the option to post a “still open for business” status alerting potential applicants that there’s still time to submit an application. For classes entering between 2014 and 2016, the average number of colleges that would consider postdeadline applications over that three-year span was 436. For the past three years? The average was 554 — a 27-percent increase.

This was my summer of 2019 takeaway: Higher education has fully entered a new structural reality. You’d be naïve to believe that most colleges will be able to ride out this unexpected wave as we have previous swells.

Those who saw modest high-school graduation dips by 2020 as surmountable must now absorb the statistical reality: Things are only going to get worse. As Nathan Grawe has shown, a sharp decrease in fertility during the Great Recession will further deepen the high-school graduation trough by 2026. Meanwhile, the cost of attendance for both private and public colleges insists on outpacing inflation, American incomes continue to stagnate, and college-endowment returns or state subsidies can no longer support the discounting of sticker prices. And nearly three out of four economists reportedly believe a significant recession is likely to be underway by 2021.

This perfect storm has changed, and will continue to change, student and family college-choice behavior for the next decade and more. I see this playing out across three dimensions: majors, money, and mission.

As any number of reports have shown, students have been inexorably marching away from the traditional liberal-arts majors. One such report from the American Academy of Arts & Sciences noted that bachelor’s degrees in the humanities represented 17 percent of all degrees conferred in 1967, compared with 5 percent in 2015. Pitzer College, a nationally ranked liberal-arts college, reported that the five top majors among its Class of 2019 were: environmental analysis, organizational studies, biology, economics, and psychology. Some preprofessional majors are faring no better: Bachelor’s degrees in education declined by 15 percent between 2005 and 2015. It is little wonder that the Pennsylvania State System of Higher Education, significantly dependent on teacher education, has seen its 14 state-owned universities lose 20 percent of their collective enrollment since 2010.

I don’t see these trends changing, especially when coupled with stagnating income and the resulting pressure on a family’s return-on-investment calculus. Many in higher education assume families don’t value the liberal arts anymore, but it’s more nuanced than that. Families hear the importance of “soft skills” (communications, creativity, etc.); they just don’t accept that their children need to major in a liberal-arts field to gain them and to secure a job after graduation. Continued adherence to traditional, low-demand curricula or knee-jerk adopting of “hot” majors will only exacerbate the problem.

Bucknell’s most significant shortfall in 2019 was in admitted students who were offered financial aid. I heard from other enrollment managers who had a similar experience. So, what gives?

One answer could be Virginia Tech — not just the institution itself but the sector it represents. Virginia Tech overenrolled its incoming first-year class for 2019 by 1,000 stu-
ents. (Talk about a yield model imploding!) My guess is they did not anticipate the sharp rise in students aiming to attend lower-cost, high-profile public institutions. In 2018, four of the top six enrolled-overlap schools for Bucknell were public universities.

The handwriting was probably on the wall, as the national, first-year discount rate had already crested the 50-percent mark; according to the National Association of College and University Business Officers (NACUBO), it was 39 percent as recently as 2008. This steep rise is significantly fueled by colleges that have adopted the airline pricing model: If the plane is going to fly anyway (and if there are still spots open), no harm in getting even pennies on an otherwise unsold ticket. For colleges discounting at or above the national figure, this is unlikely to be a sustainable strategy. However, in the meantime, they are no doubt pulling students away from colleges that expect full-pay or better-pay students to foot the true bill. In short, price sensitivity is a structural reality when supply (number of college beds and desks) is greater than demand.

At the dawn of the 20th century, the railroad industry nearly collapsed. Why? Because industry leaders (wrongly) believed their primary mission to be railroading, not transportation. For too long, colleges — public and private, liberal arts and research-driven, rural and urban — have operated as if they’re solely in the higher-education business rather than in the broader postsecondary-education sector. Traditional residential colleges took solace in slaying one-and-done competitors like the University of Phoenix or MOOCs. Now the challenges come on multiple fronts: There are still for-profit insurgents clipping at our heels, not to mention distance-learning platforms, academic boot camps, and company-sponsored certificate programs. Consider this 2019 comment from Tim Cook, Apple’s chief executive: “I don’t think a four-year degree is necessary to be proficient in coding. I think that is an old, traditional view.”

I don’t expect Bucknell’s analysis of the 2019 admissions cycle to show any meaningful incursion by nontraditional competitors. However, what we won’t know is how many high-school seniors opted out of the four-year college pathway in favor of shorter-term, anytime, lower-cost credentialing. These legitimate competitors pose risks enrollment managers must acknowledge before it is too late.

Disruption is here to stay. Campus leaders cannot change the wind direction, but they can trim the institutional sails. Campus leaders cannot change the wind direction, but they can trim the institutional sails.

Bill Conley is vice president for enrollment management at Bucknell University.

This article originally appeared in The Chronicle.
There’s a Lot More to the Enrollment Crisis Than Demographics

IN A RECENT conversation about potential threats to higher education, W. Joseph King, president of Lyon College and an author of How to Run a College, made an astute observation about today’s environment. When you see the lowest birthrate ever recorded, he said, the challenges of demographic change are simply a reality that all colleges are going to need to face. “But,” he added, “it’s not just the demographics.” In other words, as important as demographic forces will be in coming years, colleges must act decisively to control the many things that are within their power.

This is not to suggest that low fertility rates and shifts in population composition are of little consequence. Just ask colleges that depend on markets in the Northeast and Midwest, where the Western Interstate Commission for Higher Education (Wiche) reports that the number of high-school graduates has declined since 2010. The downward trend is likely to accelerate and to extend throughout the country in the mid-2020s, as a consequence of fertility declines that began during the financial crisis and have continued to decline.

At the same time, the country’s racial and ethnic makeup continues to evolve. Drawing on Census Bureau data, William H. Frey concludes that the country will become “minority white” around midcentury. But institutions that serve traditional-age students won’t have to wait nearly so long for their milestone moment, because younger generations are substantially more diverse. Frey, author of Diversity Explosion: How New Racial Demographics Are Remaking America, reissued in 2018, expects whites to become a minority among 18- to 29-year-olds in less than a decade. Whites will make up less than half of the under-18 U.S. population next year.

It is difficult to imagine that these changes in population size and composition will pass without making an indelible impression on campuses. However, as important as demographic trends are and will continue to be, we must resist the temptation to see everything through this single lens — even when examining stories that contain demographic threads.
For example, consider some recent headlines. From *U.S. News & World Report*: “Nationwide college enrollment is down again.” From the *Los Angeles Times*: “Freshman applications dip at UC for the first time in 15 years. Is it the start of a trend?” From the *The Wall Street Journal*: “Oberlin, University of Chicago and other elite colleges extend application deadlines.” And from the *The Boston Globe*: “Green Mountain College in Vermont will shut down.”

To be sure, each of those stories includes a demographic facet. In the first case, after years of rising numbers of college-age young people, nationally we find ourselves on a plateau with more or less stable high-school graduating cohorts. So year-over-year declines in college enrollment were uncommon in the past but are more likely now. However, the headline isn’t about a single-year setback; we have seen eight straight years of contraction. That’s not the result of a plateau. Surely the current downward trend largely reflects recovery from the deepest recession in modern economic history. Even as we contemplate new demographic trends, we should not lose sight of the many ways in which economic forces currently drive a range of educational outcomes, including enrollment, the desire for credentialing, and trends in students’ choices of academic majors. Similarly, deep enrollment reductions at for-profit colleges remind us of the power of regulation — as each day sees a new proposal for redesigning student loans and other federal aid.

Headlines heralding declining application numbers at selective colleges might also point to demographic change. In fact, it might seem more comfortable to interpret those changes as demographic phenomena than to consider alternative explanations. For instance, the persistence of declarations that higher education’s financial model is broken is matched only by the upward trend in the discount rate. Perhaps the high-sticker-price/uncertain-financial-aid model has finally reached a breaking point. Alternatively, changes in application behavior may reflect growing dissatisfaction with admissions practices — which, according to a recent poll, are characterized by more than one-third of Americans (including four in 10 nonwhites) as very or somewhat unfair.

And what about college closures in Vermont? Surely this is a simple demographic story: The state that Wiche figures has shed more than one-quarter of its high-school graduates since 2007–8 has now lost a nearly proportionate share of its private colleges. Yes, but another important storyline suggested by this headline is that a large number of institutions live precariously close to the existential boundary, operating with little margin in the event of even modest enrollment decline. According to an analysis by the consulting company EY-Parthenon, “122 institutions exhibit more than four [of a possible eight] risk factors for closing,” such as deficit spending, debt payments in excess of 10 percent of expenses, and enrollment under 1,000.

Perhaps the implication of demographic change is that institutions need to spend more time attending to unchanging fundamentals critical to institutional sustainability. After all, whatever we may do to prepare for the future — and we have many options at hand — even the best-endowed college can’t add to the number of Americans born in 2015. The challenges facing higher education are multiple, and most of them will be made more difficult as prospective-student pools shrink in the next decade. Before the brunt of the birth dearth is upon us, now is the time to address the cracks already visible in our practices and financial models. By attending to nondemographic threats, we may just find that the demographic stresses are reduced.

For example, David Kirp’s 2019 book, *The College Dropout Scandal*, makes an impassioned argument for serious improvements in low
retention rates. The National Student Clear-
inghouse Research Center estimates that only 62 percent of students entering college in 2017 returned to the same institution the following fall. One in four didn’t re-enroll anywhere only 12 months after beginning college. Glenn Davis and fellow researchers at St. Cloud State University, in Minnesota, figure that improve-
ments in retention begin with identifying at-risk students. They have developed a brief survey that detects first-year students who are at risk for attrition because of a low sense of belonging despite strong grades. At Rutgers University, some student-work supervisors are being trained to use their professional rela-
tionships with student employees to connect them more securely with the campus. While student success is always of the highest value, shrinking pools of prospective students make retention improvements important to institu-
tional sustainability.

Similarly, recent work by Strada and Gallup finds that students are more likely to see value in their education — and to view it as worth the price — if they’ve taken courses that they perceive as relevant to their lives and careers. While this result should not be used in misguided ventures to turn all students into STEM majors, it is a reminder that, regardless of major, higher education should prepare stu-
dents for meaningful lives following college. Some colleges have responded with interde-
partmental degrees, such as “computer science + X,” which often pair marketable comput-
er-science skills with humanities studies (though Stanford University recently backed away from a similar initiative). Other colleges have brought relevance to existing programs through increased support for internships. However designed, these efforts aim to make clearer the links between college studies and life after graduation.

By attending to nondemographic threats, we may just find that the demographic stresses are reduced.

Barring significant changes in people’s desire for college, demographic shifts prom-
ise to reshape parts of higher education in the decade to come. However, by looking past those forces, which we cannot control, and focusing keenly on the fulfillment of our missions, which we can control, we can create new and better futures for our students and our institutions.

**5 Views on the Future of College Enrollment**

**Make Enrollment Count in Strategic Planning**

By JOHN BOECKENSTEDT

It’s hard to speak to anyone at a university without hearing about looming demographic changes. We are all keenly aware that the changing numbers and mix of our prospective-student markets, coupled with new economic realities, are changing how we address challenges and plan for a future that seems more uncertain. While we can’t change the number of people born 18 years ago, we can adapt to a changing world. As you embark on strategic planning, here are important things to consider:

- **Understand that your portfolio of enrollments is complex.** Programs that bring big numbers may not be bringing you much revenue. Some programs may be vital from a mission standpoint, others from a revenue standpoint. Balance is key, and seeing the inherent trade-offs is an essential component of good decision making and planning. Often, unintended consequences are the ones you need to anticipate most.

- **Take a look around.** Does your faculty, your staff, and your curriculum look a lot like they did before today’s students were born? If so, do you think that best prepares you for the immediate and the distant future? Are you including people in the planning process who might otherwise be invisible on campus?

- **Fix the problems you have, not the ones you wish you had.** Declining net revenue, deferred maintenance, and a lack of diversity all compromise both your immediate viability and your future market position; small decreases in SAT averages or a lack of National Merit Scholars are less critical.

- **Think about new opportunities, and streamline processes to bring them from idea to fruition.** You can’t do much about state requirements that bog down degree approval, but you can improve the efficiency of internal processes that consume precious time and resources, and you can create incentives to reward those who bring successful programs to market. Do you know how much of your enrollment is in relatively new programs? Should you?

- **At the same time, good strategy requires you to stop doing some things.** That, of course, is easier said than done at a university. Academic programs are always the first thing people think of, but there are many things a university does that are less vital to its mission, and those should be reviewed. Examples might include particular athletics teams, centers or institutes that neither generate revenue nor advance the mission, and promotional activities that have no measurable return on investment. This is perhaps the most vital component of strategy.

Good planning is hard, but it’s essential, of course. Framing your challenges, understanding trade-offs, and thinking broadly don’t guarantee success, but they increase its likelihood.

Jon Boeckenstedt is vice provost for enrollment management at Oregon State University.

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**No, Your College Is Not an Exception**

By MADELEINE RHYNEER

The admissions landscape is distressing. College enrollment is down 1.7 percent nationwide, and universities up and down the quality chain missed headcount goals this fall. Throw in Moody’s negative credit outlook for higher education; hypercompetition; a booming economy drawing prospective students into the labor force; fewer high-school graduates in most regions; students with different needs and expectations; free-college initiatives; state funding challenges; and parents who can’t or won’t pay for college, and I see serious headwinds with a very long tail.

How can we inoculate our institutions from this storm?

Start by acknowledging that most families view college as a transaction, not as a time of transformation. I think fondly of my undergrad experience, when I was drawn by my love of learning, acquiring knowledge for its own sake. Those days are gone. According to the CIRP Freshman Survey, students are going to college (and having their parents pay for college) to get a good job. Understand their pragmatism and embrace it. It is time to prioritize what students want and...
need over what we want to teach. Heresy, I know.

If colleges don’t make bold decisions, the market will make them for us. We must collaborate internally to identify new academic programs, better retention methods, new modes of delivery, and other approaches that speak to what families seek and are willing to pay for.

Finally, we must rewrite the business model of higher education. Our cost increases each year outstrip the ability of students and their families to pay — so we increase our discount rate, a zero-sum game. How can we reduce fixed costs and still provide a high-quality education? There’s a Nobel Prize in economics for the person who figures it out.

Madeleine Rhyneer is vice president for consulting and dean of enrollment services at EAB, a consulting firm based in Washington, D.C. She formerly served as vice president for enrollment and marketing at Susquehanna University.

The Definition of Insanity

By ANGEL B. PÉREZ

It is often said that the definition of insanity is doing the same thing over and over again and expecting a different result. For decades, this is how colleges handled enrollment. Instead of transformation, they tweaked at the margins. This is no longer sufficient. The answer to the “revenue problem” has always been “get more students who can pay” or “go recruit in a new market.” Those wells are drying up.

Unlike businesses, colleges don’t have many levers to pull when their product is no longer in demand. When computer sales drop, Apple creates a new device. When Americans buy fewer of its vehicles, Ford increases sales abroad. Higher education does not have this luxury. Colleges have to ask: What else can we do to increase revenue that is consistent with our mission? Colleges have historically added programs, increased the size of their student body, or added fees. We are hitting a wall on all of those options.

The enrollment game is fiercely competitive, and every college plays it — which means that every college will have to decrease its dependence on traditional enrollment.

In short, colleges must be willing to radically reimagine their business models. This does not mean redefining who they are and what they do; it’s about doing new things. Partnerships with corporate America, alternative uses for campus buildings, different methods of curricular delivery, and programming and housing for adult and retired populations are just a few options. Colleges should emulate successful businesses — figure out what their “customers” need, and design products and experiences to meet those needs.

The challenge is that this requires institutions to fundamentally change how they operate. Small liberal-arts colleges, for example, are used to serving a traditional-age student population. If they are to attract adult and nontraditional learners, they must redesign everything.

Change in higher education moves at a snail’s pace, but this crisis requires expediency.

The colleges that will thrive in the decades ahead are those willing to take risks while keeping their mission and history at the core of every decision they make.

Angel B. Pérez is vice president for enrollment and student success at Trinity College, in Connecticut.

More Colleges Will Likely Close

By STEFANIE D. NILES

We have entered into a time of unprecedented uncertainty. Even when predictive models, based on years of tried and true results, indicate things are on track, more and more institutions get blindsided on May 1.

The typical answer to declining revenue is “enroll more students.” That comes at a cost. Some institutions will still miss their net revenue targets since they have to provide deep discounts to get students in the door; others compromise by enrolling students who aren’t academically prepared and may struggle to graduate.

In the current climate, even compelling student outreach tactics won’t necessarily help. There are simply fewer students going to college, and that will continue to be the case for at least the next 10-12 years.

As a result, colleges will likely continue to close. There are simply too many colleges competing for a dwindling pool
The Biggest Threat Is to the Neediest Students

By RICHARD A. CLARK

I’m often reminded that I sit in an enviable position. Georgia Tech is not fighting to meet our enrollment goals. We are not calling students from our wait list instead of enjoying Fourth of July barbecues or repackaging financial-aid offers in early August to fill beds and save faculty jobs.

At many colleges in New England and throughout the Midwest, however, each meeting of deans or trustees includes at least two citations from Nathan Grawe’s book Demographics and the Demand for Higher Education (Johns Hopkins University Press, 2018). Meanwhile the South and the Southwest are growing.

As a result, the conversations around enrollment at healthy publics, particularly in the South, is not will we be a decade from now, but rather who will we be? My biggest concern is that our nation’s most prominent public universities will continue to become more socio-economically homogeneous.

With drastic declines in state support, particularly since the Great Recession, public universities with strong brands have increasingly sought nonresident tuition to satisfy the bottom line. Combined with the steadily increasing cost of attendance, the representation of high-income students on these campuses has ballooned.

While programs like the University of North Carolina’s Carolina Covenant and Georgia Tech’s Promise have done an excellent job of providing debt-free education to the neediest students, representation of middle-income students has continued to dissipate, effectively creating a financial barbell. Initiatives such as the University of Georgia’s Commit to Georgia and the Texas Advance Commitment at the University of Texas are seeking to address the problem, but they are also indicators of the extreme challenge many flagships face enrolling diverse socioeconomic classes.

Without more concerted efforts, the middle-class student will continue to be squeezed out — or saddled with an unconscionable debt burden upon graduation. If our most prominent public universities are unable to re-establish public trust and effectively articulate their need for state appropriations to bolster need-based financial aid, they risk losing the very students they were created to educate.

Richard A. Clark is director of undergraduate admissions at the Georgia Institute of Technology.

Some of these excerpts were drawn from opinion articles in The Chronicle.
When we asked a group of enrollment experts how their colleges were preparing for demographic change, we got a wide range of responses. Specifically, we asked: “Is your college planning to identify and/or evaluate applicants differently, or to use other strategies, such as broadening your academic offerings? If so, what are some of the steps you are taking? And how might your college’s strategic-planning process address changing demographics?” One common theme in these responses: Know who you are.
Jefferson R. Blackburn-Smith
Otterbein U.
A Midwestern college taps underserved students and adds distinctive programs

Otterbein University, a private, liberal-arts university located in Westerville, Ohio, has been dealing with the changing demographics of the Midwest for the last decade. As an enrollment-dependent institution, that means diversifying our student body while remaining true to our mission and values.

To that end, we created the Urban Districts Initiative, focused on enrolling, supporting, and graduating underserved, low-income students from central Ohio’s urban districts. Our faculty has adopted a framework that Otterbein must be a “student-ready” campus, rather than a campus looking for “college-ready” students. Recently Otterbein expanded the initiative statewide with the Opportunity Scholarship, which meets full-need tuition for Ohio residents whose families earn less than $60,000 or who are Pell-eligible, by covering tuition costs not covered by state and federal aid. This increase in institutional need-based aid allows Otterbein to serve students who would not have considered us in the past. As a result, a third of our entering students are now Pell-eligible.

We added academic programs that are distinctive or meet a growing need in our community. Our Zoo and Conservation Science program is one of a handful of programs nationally that provide undergraduate internship and research opportunities in zoos and conservation programs around the world. The addition of systems engineering led to the creation of The Point, a unique STEAM Innovation Center covering science, technology, engineering, arts, and math. It brings together academic programs, a public makerspace, and an array of business and industry partners, including start-ups and established corporate partners like JPMorgan Chase, which provide student work experiences. New graduate programs, including the master of educational mathematics, the psychiatric and mental-health nurse practitioner major (an online option within the nursing program), the master of allied health, and a soon-to-launch master of athletic training have helped sustain our graduate enrollments.

In partnership with Columbus State Community College, we created a dual-admission program with shared academic advising that gives students a unified academic experience on two campuses, eliminates transfer barriers, and offers one of the most affordable pathways to a bachelor’s degree.

The results of this work are truly impactful. Since 2015, our undergraduate degree-seeking enrollment is up 167 students, or 7.5 percent — all from new programs or underserved, low-income students. Equally important: Our retention rate is up 6 percentage points (to 83 percent), and our four-year graduation rate is up 9 percentage points (to 60 percent). By assessing the challenges of demographic change as they began and responding strategically, Otterbein is a step ahead of many universities that are just beginning to respond to this crisis. We have also developed a road map for our future success.

Michael J. Knox
West Texas A&M U.
A public university’s selling points: low cost, high quality, rural values

West Texas A&M University is fortunate to be located within a state that, unlike many others, has a growing number of high-school graduates. Despite that, we are taking many proactive steps to help our institution succeed in an increasingly competitive recruitment environment. Many of our strategies are aimed at differentiating ourselves through a strong focus on our region’s geography, values, and passions: We serve the plains, towns, ranches, farms, and communities of the Texas Panhandle.

In our recently published strategic plan (called WT 125, a reference to our 125th anniversary), we envision our institution 20 years from now. We lay out a strategy to carve out a new space as a regional research university — a classification category that currently does not exist. We believe that being responsive to the rural needs of West Texas will make us more attractive not only to students with whom we share geography, but also to those in many other rural regions in the nation and the world. (We have about 250 international students on our Canyon campus and an online presence in 27 countries.)

Although rural Americans make up just 20 percent of the U.S. population, we see a niche we can fill, since most universities are more likely to recruit students in dense population centers. For example, we recently launched an online doctoral program in education leadership that focuses on leadership of small school districts. That program enrolled 30 doctoral students in its first year — double what we expected — and demand has since exceeded our capacity.

In undergraduate admissions, in 2019 we launched the WT Principal’s Scholars program, which “deputized” high-school principals to identify up to five graduating students for direct admission to WT. We accept those students solely based on the recommendations of principals in school districts we serve, and of principals of small high schools statewide. The students do not need to go through
the formal admissions process or pay an application fee. The program contributed to an almost 10-percent boost in our freshman class in fall 2019. We are working on obtaining scholarship money for the program and will review the success rates of its students.

Finally, we work to keep a cost structure that is among the most competitive in the country. That sweet spot where high quality and low cost meet makes a compelling recruiting pitch.

**Kirk D. Young**

**Jamestown Community College**

A community college in the Rust Belt grows more diverse

At our college we are undertaking a number of strategies to try to address the very challenging situation we are facing in rural upstate New York. I have worked all over the country in enrollment management, and working in the Rust Belt presents a number of significant challenges. The most serious is the decline in our region’s population, from which we have always drawn most of our students.

We are taking a number of steps to try to mitigate the impact of these demographic changes. They include:

- **Broadening our reach.** We are significantly increasing our investment in out-of-state and international recruitment. We have also invested significantly in recruiting in New York City. As a result, our student body is rapidly becoming more diverse — something that is very new to our community.
- **Supporting diversity.** As our college becomes more diverse than the local population, we must do a better job as an institution at recognizing the value of diversity and serving the needs of all our students.
- **Forming strategic partnerships with several regional, four-year institutions.** While these colleges previously may have rejected applicants that did not meet academic admissions standards, they are now working with us to give those students a better chance to succeed. When they are ready, students transfer to our four-year partners. This is proving to be a valuable partnership for us, the four-year institutions, and the students.

We are also aggressively pursuing additional academic programs, seeking funding to help students with expenses other than tuition, hiring additional recruitment counselors, investing heavily in digital marketing, and leveraging our social-media outlets.

**Corry D. Unis**

**Fairfield U.**

Using demographic challenges to shape priorities

As we develop the next version of our strategic plan (adopted in 2014), Fairfield University, in Connecticut, has taken an aggressive approach to prepare for forthcoming demographic challenges. Fairfield has made significant investments in our academic infrastructure, with new facilities for our Egan School of Nursing and Health Studies and our Dolan School of Business. These modern facilities allow students to receive a cutting-edge academic experience focused on successful student outcomes.

We have added degrees at both the undergraduate and graduate levels, and found ways to create seamless pathways for our undergraduate students to directly matriculate into our master’s-degree programs. Our faculty and academic affairs divisions are keenly aware of the headwinds and are constantly evaluating potential areas of expansion that sync with institutional strengths and priorities.

Equally as important as academic infrastructure, we have increased our housing capacity and have made many improvements to facilities that support student life. It is important for our university’s history and ethos to position ourselves in a way that focuses on student well-being and student success.

The conversations around changing demographics have inspired us to cast a wider net when it comes to our student demographics. We have been actively recruiting students throughout different regions in the United States and have started to make strides to enroll students from other nations.

In terms of student profile, we have made a conscious decision to become more selective in those we admit. Our acceptance rate has fallen more than 14 percentage points in the last five years, and average GPAs and standardized test scores have risen. We believe our increased academic profile will help us shape the class in meaningful ways that will assist us in a competitive enrollment landscape.

As for our enrollment-management process, we have made tremendous strides in our analytical capabilities and have made investments for deeper data analysis. Our enrollment team understands the importance of data-driven decisions and how modeling can assist us in accomplishing complex goals.

The challenges facing higher education have actually been helpful in our strategic-planning process by helping us to synthesize what our institutional priorities should be, and by allowing us to build consensus about our strengths as a modern, Jesuit university that is values-based, student-centric, and outcomes-focused.
Andrea Felder
American U.

Expanding opportunities to study in the nation’s capital

Because of our location in Washington, D.C., American University has been able to draw students from across the United States and around the world. However, we draw our largest number of applicants and matriculants from the mid-Atlantic and Northeastern regions of the U.S. — areas expected to experience declines in the number of high-school graduates in the coming years. Among other priorities, our university’s new five-year strategic plan — Changemakers for a Changing World — seeks to address future demographic challenges.

While AU will continue to recruit talented and diverse students nationally and globally, the university aims to build stronger connections with the Washington region. Specific to enrollment, the university aims to expand educational opportunities for regional students who have not traditionally sought higher education at American University. AU will broaden its dual-enrollment partnerships between our School of Education and D.C. Public Schools to create a pipeline of students focused on education and teacher preparation. In addition, we will refine our recruitment and financial-aid strategies to encourage marginalized communities, in D.C. and elsewhere, that are traditionally left out of higher education to apply and enroll at American University.

We will continue to expand our pipeline of international students via English-pathway programs. We also intend to create regional hubs around the globe that will leverage existing relationships with school counselors, alumni, parents, and other friends of the university to recruit global students to AU.

Lastly, the university intends to improve the educational value and experience for transfer students and student veterans so that AU becomes a destination institution for these two growing student populations.

As AU welcomes these students to campus, we must also consider if we are providing the support and services necessary for these students to succeed.

Sundar Kumarasamy
Northeastern U.

A global emphasis and innovative majors draw new students

At Northeastern University, we are acutely aware of macro-level trends that will affect the higher-education landscape in the coming years. In light of many projected changes, Northeastern has embarked on a bold strategic plan centered around the creation of a global university system that gives students the opportunity to learn from wherever in the world they are.

Building upon our expertise in experiential learning, the university’s expanding network of campuses and academic partners across the globe positions us to tap into new markets and to attract students by offering a differentiated educational experience — one that facilitates student mobility; provides immersive, experiential-based learning opportunities; and offers flexible options to existing semester-based course and program structures. For example, in 2019 we invited a small cohort of first-year students to enter the Global Engagement Program, an interdisciplinary undergraduate experience in which students rotate among London, Boston, Seattle, and San Francisco during their four years. The continued build-out of our global university system and the unique experiences we can offer will become increasingly attractive to both domestic and international students who value immersive educational opportunities.

Innovative program offerings also can attract new audiences. Specifically, Northeastern’s ever-growing list of 130-plus combined majors represent unique, hybrid degree programs that encourage students to explore multiple academic fields without increasing cost and time to complete the degree. These combined majors, which include degrees pairing physics and music or computer science and sociology, to name a few, reflect Northeastern’s vision of becoming a model of interdisciplinary collaboration. Solutions to society’s most pressing problems are addressed by blending knowledge across multiple disciplines.

Furthermore, as demographic shifts take place and the world around us continues to rapidly evolve in the age of artificial intelligence, the way in which we evaluate students as being a fit for Northeastern also requires adaptation. Increasingly, professional success requires a new set of skills that combines an understanding of the highly technical environment that surrounds us, coupled with uniquely human qualities such as creativity and mental flexibility.

To this end, Northeastern continues to explore ways of evaluating students beyond the traditional methods of standardized-test scores and grades, instead looking toward evaluation methods that showcase competencies across literacies in technology, data, entrepreneurship, creativity, and ethical decision-making. Our focus is on identifying and attracting students who are multidimensional, take an interdisciplinary approach to problem-solving, and show a passion for pursuing an education that transcends the artificial boundaries of place and circumstance that, forfar too long, have constrained higher education.
Further Reading


“Boston’s Colleges Are Going Broke — and We May All Have to Pay,” by Michael Damiano, Boston Magazine, January 29, 2019

“College Presidents Discuss Enrollment Declines, Volatility in Higher Ed,” by Emily Brown, University Business, September 11, 2019

“The Coming College Enrollment Bust,” by Justin Fox, Bloomberg, May 30, 2019

Demographics and the Demand for Higher Education, by Nathan D. Grawe, Johns Hopkins University Press, 2018

“Enrollments Dropped 1.7 Percent This Spring From a Year Ago,” by Dan Berrett, The Chronicle of Higher Education, May 30, 2019


“Higher Education is Headed for a Supply and Demand Crisis,” by Jeff Selingo, The Washington Post, January 28, 2018


“Private Colleges in Peril,” by Stephen Eide, Education Next, fall 2018

“Survival of the Proactive,” by Colleen Flaherty, Inside Higher Ed, January 28, 2019

“Term Enrollment Estimates,” National Student Clearinghouse Research Center, spring 2019


“With Enrollment Sliding, Liberal Arts Colleges Struggle to Make a Case for Themselves,” by Jon Marcus, The Hechinger Report, May 18, 2018

“Why Enrollment Is Shrinking at Many American Colleges,” by Richard Vedder, Forbes, July 5, 2018
The changes roiling academe today are more complex than ever, and provide plenty of reasons why a college leader might need to have a tough conversation with faculty members, students, administration, or other key groups on campus. Learn how to communicate and manage even the most complex challenges. Few enjoy difficult conversations in the workplace, but certain strategies and practices are more likely to lead to productive dialogue and positive change.

Preparing for Tough Conversations
How to set the stage for major change on your campus

Sustaining the College Business Model
How to shore up institutions now and reinvent them for the future economy

The Right Mix of Academic Programs
Making decisions to add, cut, grow, or shrink departments and degrees

Mounting financial pressures and increased competition for students are pushing more colleges to re-evaluate their academic programs. But before proposing — or even considering — changes to the academic lineup, campus leaders need to take stock. Learn how to approach a program audit or prioritization process and where to go from there.

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