

Enrollment Planning in an Era of COVID-19 and Economic Crisis

"In the midst of every crisis, lies great opportunity."

- Albert Einstein -

The Current Context

Nearly two years ago, I wrote a book, *Managing the Student Enrollment Obsession*, which addressed an emerging disruption in higher education caused by a combination of environmental factors (e.g., rising college costs, unprecedented student debt burdens, demographic shifts, changing student attributes and expectations, technological and teaching innovations, the emergence of nontraditional educational providers, perceptions related to the value of a college or university credential). While these factors are still in play, they largely have been eclipsed by the current pandemic. Public health concerns, job losses, and a historic rise in unemployment have had a profound impact on students and their families as well as the institutions that serve them.

Unlike the gradually evolving environmental factors illuminated in my book, the COVID-19 disruption to higher education has been immediate and could not have been predicted. Many have called the virus a “black swan” event—extremely rare, severely impacting people, and in hindsight, broadly perceived that such an occurrence was inevitable. Regardless of one’s politics or perceptions about our new reality, higher education has been shaken to its foundation. Campuses have closed, instructional and service delivery methods have been adapted virtually overnight, endowments and budgets have been decimated, and student enrollment decisions have been altered or stalled.

Arguably, the academe has not experienced this magnitude of challenge since the Great Depression. In the wake of the Depression (1930s), state appropriations dropped by an average of forty percent, private college endowments shrunk by more than twenty-six percent, student enrollments shifted from high-cost institutions to those that were more affordable, and students migrated to majors with a higher potential of employment upon graduation. During the 1930s, there were far fewer postsecondary institutions in the United States, few two-year colleges existed, no student loan programs or G.I. Bill were in place, and most importantly, no pandemic was present at the time. Another significant difference between then and now is that, following the end of World War I, there was decade-long enrollment boom.



That has not been the case over most of the last decade. With that said, much like the 1930s, there are families struggling financially and students experiencing heightened food and housing insecurities. Just as importantly, there is great uncertainty about the future, as the coronavirus wreaks havoc on communities around the globe.

Within this context, student enrollments are precarious at best. Some prognosticators have predicted an overall decline of fifteen-to-twenty-five percent in the coming year. Though this level of enrollment decrease may well occur at many institutions, there will be some that remain fairly stable and others that will experience an increase in students. A recent study published by AACRAO (2020, April) supports this hypothesis. Of the 262 institutions responding to the AACRAO survey, 40% indicated that their fall new student enrollment deposits are down compared to last year. Conversely, 29% reported an increase in deposits, and 31% conveyed that deposit numbers are approximately the same as in Fall 2019. Similarly, respondents indicated that continuing student fall registration numbers vary (44% down, 13% up, and 43% no change). Admittedly, the sample is small; it is early in the fall enrollment cycle; and the report does not provide a breakout by institutional type, geography, or student demographic. It also does not consider graduate enrollment indicators.

At this juncture, forecasting precisely how enrollments will shake out in the fall is nearly impossible. It is, however, likely that non-elite private colleges and institutions that serve high numbers of international students, students from low- and middle-income families, first generation students, and underrepresented minorities will be disproportionately affected. Traditional residential colleges and universities also may be adversely impacted in the near term because they have temporarily lost one of their primary competitive advantages—the on-campus college experience. If shut-downs, social distancing measures, and economic devastation continue for a prolonged period of time, predicting the enrollment impact will become even more improbable.



For these reasons, it is more important than ever to have a sound but flexible enrollment plan. In the days ahead, **strategic dexterity** is the most valuable asset any institution can possess. Reacting to every crisis on the ground is not a winning or sustainable approach to managing student enrollments. The schools that emerge stronger at the end of the COVID-19 pandemic will be those that innovate and strive to get ahead of a plethora of changing dynamics.

Obsolete Enrollment Planning

Whether completed in-house or with the assistance of an external consultant, enrollment planning typically includes certain elements—data analysis, environmental scanning, broad consultation, enrollment projections and/or goals, key performance indicators, strategy development, and related action plans. Even though all of these continue to have value in a COVID-19 world, there are now inherent challenges and limitations to each.

For example, **examining historical data** rarely will serve as an indicator of future trends and recent areas of enrollment success or failure will not map directly to what will be needed to overcome the emerging issues from this pandemic. Past yield, retention, and graduation rates will possess little meaning. At best, institutional data will suggest what may be possible at some point in the future.

Likewise, **environmental scanning** will reveal some opportunities to seize and threats to mitigate (e.g., demographic trends, economic trends, societal trends, competitor trends). With that said, scanning insights will be limited by what we know now or can even predict about factors such as:

1. the response of each student demographic to the current situation;
2. how high unemployment will affect an adult learner's desire to return to college, a family's ability to afford tuition, and a student's postsecondary educational choice;
3. the degree to which a college education is viewed as feasible and is perceived to yield a reasonable return on investment;



4. the appetite for enrolling in classes on-campus versus online; and
5. how competitors are ramping up to address their own enrollment concerns.

For the time being, **broad consultation** methods will need to accommodate people working from home. Conference calls, Zoom sessions, polling, and the like will replace face-to-face meetings. While most, if not all, institutions and consulting firms are operating in this mode now, it is far from optimal.

Given that all projections are based on assumptions, **enrollment projections** have been rendered useless. No one has a handle on what assumptions should be applied to a projection model. For this reason, specific **enrollment goals** also will be unreliable for some time. Creating projections or goals with faulty assumptions will be counterproductive. That simply leaves directional enrollment goals as the only viable option. Some examples include: stabilize enrollment, maintain market share among primary feeder schools, minimize student attrition, and ensure the supply of courses and instructors aligns with student demand.

Key performance indicators (KPIs) can still be useful but only if they are adapted based on emerging conditions. The problem with KPIs is that they are measured against benchmark data. Benchmarks from prior years do not account for our “new normal”. Consequently, the reference point for comparisons will likely need to be year one of the recovery, which is not ideal.

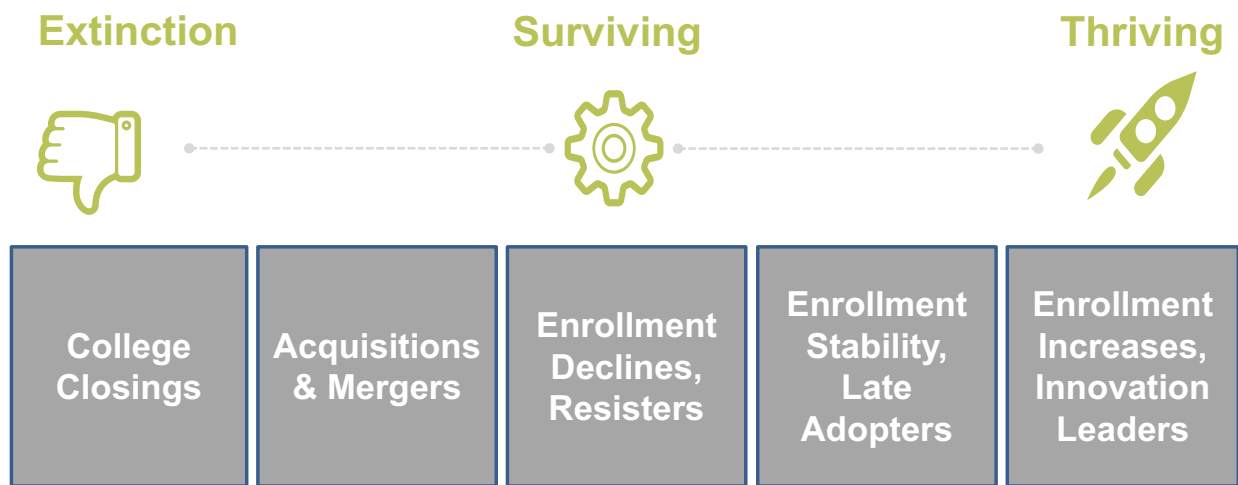
Strategies and related action plans are often linear and sometimes staged in an enrollment plan. That playbook will no longer work—at least not in the sense that an enrollment plan is an institution’s roadmap to enrollment success if one stays the course. For the next five years or more, plans and the strategies within them must be dynamic and highly malleable. Reviewing and updating plans annually is a flawed methodology in this new era.

One thing is obvious. Enrollment planning and subsequent implementation cannot be “business as usual”. Darwin’s theory of *survival of the fittest* is fully in play. Many higher education institutions face an existential threat unlike



any before, namely closings, acquisitions, and mergers. Others will survive this disruption but will be defined for many years to come by how they respond to this crisis. *Figure 1* illustrates the disruption continuum for colleges and universities. Regardless of where a school eventually falls on the continuum, it will be changed forever—some for the better.

Figure 1: The Disruption Continuum



A New Approach to Enrollment Planning

First and foremost, the new model of enrollment planning should be **scenario-driven**. At least through the next academic year, there should be scenarios for campus openings and closures by term and possibly, hybrid scenarios for part-of-term closures. The scenarios should address instructional and service delivery, staffing models, technology optimization, processes, policies, and strategies that reflect the core enrollment management functions, namely student marketing, recruitment, admissions, retention, and financial assistance. Ideally, trigger points for the transition to each scenario should be identified in advance (e.g., statewide shutdowns, positive coronavirus cases on campus, ability to ensure social distancing and/or provide the necessary testing and personal protective equipment/environment to faculty, staff, and students).

On many campuses, **enrollment goals** that guide such plans have often been unrealistic. This is no time for those types of aspirational goals. Unrealistic goals will be counterproductive and ultimately, will lead to morale issues and the derailing of extraordinary enrollment efforts. As previously posited, the best goals during times of uncertainty are directional in nature.

The first priority of enrollment plans in a pandemic and economic meltdown is to **mitigate threats**. For instance, certain student markets will be disproportionately affected by this perfect storm. Your institution should plan for a downturn in international and out-of-state enrollments and manage those risks to the degree possible. This may mean redoubling efforts to recruit and retain these populations and/or increasing market share in your local area. As cited earlier in this white paper, low- and middle-income families, first generation students, and underrepresented minorities also are populations that may not enroll or return at past levels. Targeted strategies should be developed for these groups as well.

The tricky part of enrollment planning during this crisis is that, while refining existing operations and mitigating immediate threats, there must be a parallel planning track with the long view in mind. That is to say, **what is the path to returning to enrollment stabilization and eventual growth?** As signs of a recovery emerge, higher education institutions need to be prepared to seize opportunities. To illustrate, consider the international student market. When the pandemic is gone or a vaccine exists, travel restrictions ease, and students are psychologically and financially ready to study abroad again, the colleges and universities with robust plans to reclaim existing markets and expand to new countries or regions will be the winners.

Along the way to recovery, the most successful institutions will be the ones that **avoid potential pitfalls**. Common pitfalls during any enrollment crisis include mission drift, panic-driven responses, blame targeting individuals or departments for enrollment declines, disengaged faculty and staff, and failure to invest strategically in the enrollment enterprise. Regarding the latter, during times of budget austerity, professional development, branding and marketing, and student supports often are among the first expenditures cut.



Although it may be prudent to reduce forms of **professional development** that involve travel, internal and remote training options should be considered to fill the void. Having consulted with hundreds of colleges and universities through the years, it has become abundantly clear to me that the main competitive advantage one institution has over another is their people. In large measure, your enrollment success depends on the capacity for your people to produce results. Nurture that capacity.

With respect to **branding and marketing** investments, schools that have established, distinctive brands will be the best positioned to sway enrollment decisions. While the aforementioned statement is always true, it suggests that this is not a time to lessen promotional initiatives. Perhaps, the current crisis actually represents an opportunity to ramp up these efforts—reclaiming lost market share and seizing market share from competitors.

Finally, a reduction in some **student supports** may be inevitable. However, these supports are vital to student success and thus, where possible, should be held harmless with as much vigor as academic programs are protected. Many of the supports you have serve the vulnerable populations identified in this white paper and therefore, are critical to your retention efforts.

Strategy Considerations

Undoubtedly, every college and university is exploring new strategies and approaches. Beyond postponing deadlines, implementing test-optional admissions policies, providing virtual advising, and moving to online course delivery, there are numerous strategies that should be considered. A few illustrative examples are presented here.

Virtually every **recruitment operation** is working remotely now. There are no high school visits, few campus visits or open houses, and almost no in-person meetings with prospective students and their families. This rapid change has exposed what I believe is a flawed model of student recruitment.



While personal connections represent one of the most powerful recruitment tools, often too much time and resources are devoted to recruitment outreach. Many of our clients spend seventy percent or more of recruiter time generating leads.

The recruitment process occurs in three phases: (1) **generating interest** and leads, (2) **cultivating identified interest** and applicants, and (3) **converting interest** into enrolled students. When there is an inadequate investment of time and resources in cultivating and converting interest, the value-added of the work completed in generating interest is greatly diminished. This gap can manifest itself as too few contacts between the inquiry and applicants stages, only process- and event-oriented communications post-acceptance, or a void of communications and contacts following orientation. Any of these issues can produce leakage in the enrollment pipeline.

Remote recruitment activities have forced a different kind of interaction with prospective students, which should continue when things return to normal. By shifting some recruiter time from outreach to the other two phases of the recruitment process, the end result will be somewhat fewer inquiries but improved yield of applicants, admits, and enrolled students.

On the **retention** front, much emphasis has rightly been placed on academic, social, and personal supports. Some institutions also have modestly focused on the financial aspects of student retention. It is likely that **financial struggles** and **mental health issues** will adversely affect an increased number of students over the next several years—perhaps becoming the most common attrition factors.

Therefore, it is prudent to ensure mental health services are adequately staffed to manage an increase in demand as well as augment efforts associated with mental health outreach and education. Regarding financial assistance, initiatives around financial literacy and student funding need to be coupled with supports for those with food and housing insecurities. New pricing models, payment policies and practices, and even a shift in the

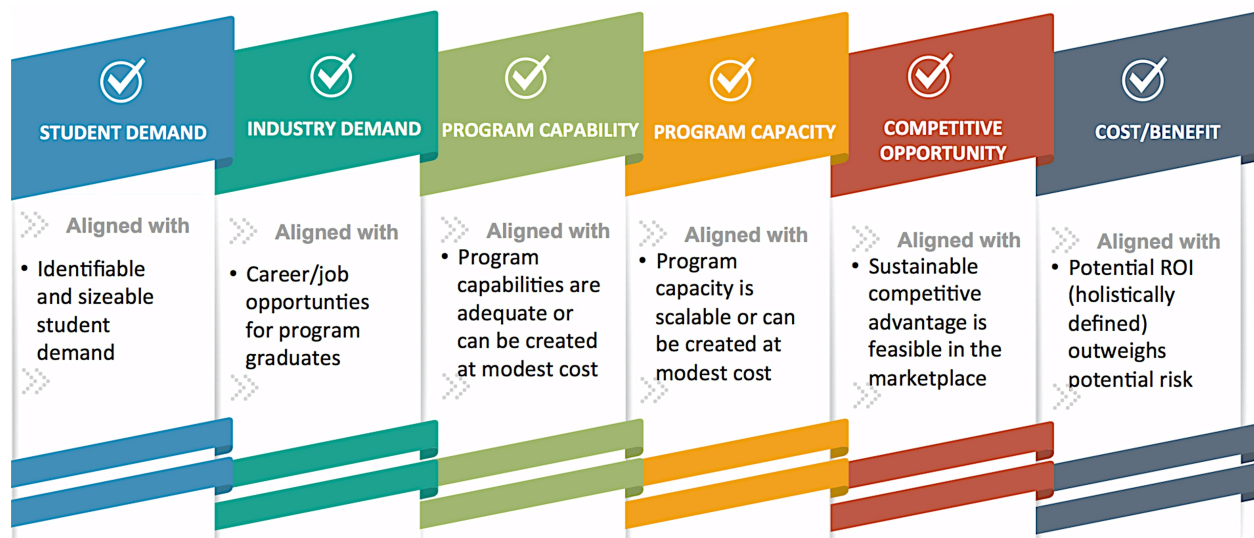


distribution of institutional merit awards more towards need-based aid should be considered.

In these uncertain times, it is particularly important to **re-recruit your current students**. They need assurances of what to expect if your campus reopens or if it remains closed. Safety, affordability, quality of education, and opportunities to engage with faculty and peers are top-of-mind for many students and their families. A campaign focused on these factors will lower anxiety and improve the likelihood of students returning.

Other than community colleges, seldom do we have clients who are interested in evaluating the **academic program array or instructional delivery modalities** to determine their alignment with market demand. Even though senior leaders and faculty are often reluctant to think in these terms, higher education is not immune to market forces. As budgets are slashed and endowments become leaner, most institutions will not have the luxury of “being all things to all people”. They should have a laser focus on what they do well and what students and industry need. *Figure 2* demonstrates desired academic program alignment from an enrollment perspective.

Figure 2: Academic Program Alignment



In marketing terms, academic programs represent an institution's educational product. As such, the right programs must be promoted to the right audience and be delivered in the right way to reach maximum penetration. Marketing and recruitment efforts that are not tightly integrated with academic programs will produce less than optimal results. Conversely, it is impossible to successfully market and recruit for a program that is not in demand. And so, now more than ever, it is imperative that enrollment planning be centered around academic programs.

Final Thoughts

The academe is resilient. Institutions are blessed with an abundance of innovative and dedicated people. So, leverage this invaluable asset to reinvent your school. View the current crisis as an opportunity to improve your college or university and the experience your students have.

Enrollment planning is just one tool you have to make a significant difference in how your institution weathers this crisis. It is not a quick fix for the problems you are facing right now. Rather it is about mapping out a longer journey, which will allow you to define your institution's destiny.

About The Author



The president and CEO of SEM Works, Dr. Jim Black, is an internationally recognized expert in enrollment management as well as in marketing. He has published a monograph titled, *Navigating Change in the New Millennium: Strategies for Enrollment Leaders*, and five books, *The Strategic Enrollment Management Revolution*, considered to be a groundbreaking publication for the enrollment management profession, *Gen Xers Return to College*, *Essentials of Enrollment Management: Cases in the Field*, *Managing the Student Enrollment Obsession*, and *Strategic*



Enrollment Intelligence, Canada's first book on enrollment management.

Dr. Black's higher education clients have included over 500 two-year, four-year, public, and private institutions. In his role as a university administrator, Black served as an associate provost, dean, and director of enrollment-related operations.

Black earned a B.A. in English education and M.A. in higher education administration from the University of South Carolina, as well as a Ph.D. in higher education curriculum and teaching from the University of North Carolina at Greensboro.



Please contact Dr. Jim Black if you would like to have an informal conversation regarding how SEM Works can support your institution's enrollment efforts.

E-Mail: jimblack@semworks.net

Direct: 336-324-8787

www.semworks.net