Higher Education Market Leadership

A look at how higher education institutions used research across 2013 to make high-impact decisions
Introduction

RESEARCH THEMES OF 2013
Delve into the themes that dominated higher education research in 2013

FUTURE TRENDS IN HIGHER EDUCATION
Hanover Research projects the trends you will see more of in the coming years

INNOVATIVE PARTNERSHIP PROFILES
Hanover Research profiles several higher education partners to illustrate impactful research and grants projects

BEST PRACTICES FOR EXECUTING RESEARCH
Hanover Research shares tips on how to execute stakeholder surveys, an area that is often challenging for institutions

HANOVER - NOW AND THE FUTURE
A glimpse into major developments in 2013 and what to expect in 2014

WE RECOMMEND
Who Hanover Research recommends to read and follow across digital media to stay on top of higher education trends
WELCOME TO THE FIRST EDITION OF HIGHER EDUCATION MARKET LEADERSHIP, Hanover Research’s annual review of our research findings and industry trends. Based on an analysis of projects completed across 2013 for our 300+ higher education partners, this report will provide you with insights into how your peers are finding solutions to challenges they face in the higher education sector through smart and comprehensive research.
Trends in new programming:
Institutions are continuing to look at options for new programming for a variety of reasons, including wanting to reach more students by expanding program offerings into new fields; providing adult students with continuing education offerings; and creating programs that are more convenient or accessible for students, which includes altering program structure and delivery method. Several of these new programming research topics include:

- **Online education:** Higher education leaders consider the ever-expanding field of online education to be critical to higher education institutions’ long-term strategies. Recently, research specifically shows that institutions are looking for successful strategies, including online education systems, trends in academic programming, and student support services for online students, to better understand how to successfully implement this growing phenomenon. Common questions include operational practices such as the amount of tuition to charge, how much to pay faculty, how to provide support services to students, and how to help develop courses. Related to MOOCs specifically, institutions are looking to stay up-to-date with the newest research on MOOCs and their ROI.

- **New degree programs:** Institutions are exploring the creation of new degree programs (most often graduate degrees in trending fields such as health, science, and technology) to expand possibilities for the institution. Specifically, institutions are looking to keep up with trends in the regional labor market and cater to large employers in the region as well as adjusting program structure or delivery method to serve the needs of different types of students. This includes an increasing consideration of whether new or existing programs should be delivered online or in a hybrid format. Among law schools, there is wide interest in alternative programming options, such as the LLM, that supplement degree program offerings in light of reduced JD program enrollments, especially given concerns that the legal employment market is changing and JD enrollments might not return to their peak levels. At business schools, executive MBAs and accelerated MBAs as well as other undergraduate and graduate business and finance degrees with specializations in business ethics, global finance, and international business were noticeable trends.

- **Adult learners:** The student and labor market demand for adult learners, who are quickly becoming major consumers of higher education in the United States, is high. While historically, hurdles have led to low retention rates for adult students, institutions have implemented approaches to accommodating nontraditional students such as introducing flexible curricula, online and hybrid coursework, competency-based credit systems as well as identifying and providing the support services and campus resources most valued by adult students.

- **Tuition:** Institutions explored numerous topics related to tuition, including differential tuition, the impact of tuition and financial aid on enrollment, tuition and aid benchmarking, and pricing strategies, including price and net cost sensitivity.

- **Impact of the institution:** In 2013, institutions were keenly interested in measuring the impact of the institution and specific programs within the institution using a variety of methods, including economic impact studies and survey analyses of parents, graduates, and employers.

- **Strategic decision-making and strategic planning:** Connected in many ways to other research insights of 2013, institutions explored successful decision-making strategies and strategic planning models, including best practices in management models and data collection from student, faculty, and institutional resources.
MEASURING THE IMPACT OF A COLLEGE DEGREE:

In recent years, there has been an increased focus on quantifying the impact of a college degree. This effort, which is tied to accountability efforts as well as some college ranking systems, is projected to continue to increase for the next few years. A key theme within this conversation is the defining and tracking of successful student outcomes. Research related to the evaluation of student outcomes will be extensive in 2014 given the Obama administration’s potential investment of substantial federal funding in this type of initiative. While it will not be clear for a while what research questions the administration will ask, institutions should start investigating improved ways to define and track student outcomes.

MEASURING INSTITUTIONAL EFFECTIVENESS:

In a similar line of thinking, institutions are under increased pressure to justify their costs, including tuition, administrative salaries, and overall operating budgets. This pressure is expected to continue to rise in upcoming years as institutions face continuous pressure in the media and through college ranking systems.

COST OF COLLEGE AND THE IMPACT OF STUDENT DEBT:

The increasing amount of student debt and the current and future impacts of this debt are frequent national topics of conversation in the media and political outlets. As tuition prices continue to rise more rapidly than inflation and student debt continues to increase, expect this conversation to continue to dominate the airwaves.

INNOVATIVE HIGHER EDUCATION MODELS:

In the upcoming year, expect to hear more about innovative higher education models. Recent education trends and the Obama administration’s plans to waive certain federal student aid regulations have driven industry-wide interest in innovative higher education models. Types of innovative programs to watch for include competency-based education and prior learning assessment.

CONTINUED EXPANSION, ANALYSIS, AND REFINING OF ONLINE EDUCATION:

While online education and the supporting technological advances have been hot topics for several years, expect a continued expansion of online education in the coming year. However, a crucial component of the expansion of online education will be an analysis of successful systems, impacts on student learning, and conversations within institutions about the role of online learning.
As law school enrollment declined throughout the country, Wake Forest University School of Law identified a Master of Studies in Law Program (MSL) as a viable opportunity to stay relevant in an evolving student marketplace. The School of Law sought Hanover Research’s data analysis services to validate proof of concept, influence program launch, and identify development strategies worthy of pursuit when creating this new degree.

Hanover Research completed thousands of unique research and grants projects for academic institutions in 2013. The following are three partnership snapshots of how higher education institutions made strategic decisions based on Hanover’s support.

WAKE FOREST UNIVERSITY SCHOOL OF LAW

Approach: Gauge student demand and perceptions of the proposed degree
Hanover Research performed a market assessment to gauge student demand for a MSL degree at Wake Law. Once interest for the introduction of a MSL program was verified, Hanover Research analysts conducted perception surveys and analyses of employer and student cohorts to:
- Benchmark program desirability against relevant competitor offerings;
- Project earning potential, employability, and industry opportunities for graduates;
- Segment the student market in order to develop targeted recruitment strategies;
- Identify drivers of program growth, including financial aid services and direct career path opportunities.

Result: Develop and launch new degree
Hanover’s collaborative approach provided Wake Law with the industry and consumer insight needed to develop its MSL degree program. Implementing of this program now in its second year has enabled Wake Law to:
- Earn national recognition from the Wall Street Journal;
- Increase program enrollment by 100%;
- Differentiate curricular offerings and student outcomes; and
- Diversify incoming student classes.

Wake Forest University School of Law’s MSL Website
CAMDEN COUNTY COLLEGE

Camden County College saw the U.S. Department of Education’s Title III Strengthening Institutions Program (SIP) grant as an opportunity to improve graduation rates by expanding and improving coordination of activities and services for remedial students. To support its grant team under a short deadline, Camden took advantage of Hanover Research’s grant-writing expertise to develop a competitive funding narrative for its SIP proposal.

**Approach: Competitive funding appeal**

Working in tandem with Camden’s team under a tight deadline, Hanover grant consultants:

- Developed and refined the project’s design;
- Created program objectives, performance measures, and outcomes; and
- Crafted the proposal narrative.

**Result:** A proposal that scored higher than 95% of the other applications and received $2 million in funding.

Camden received $2,098,951 in funding through the SIP to achieve its project’s desired outcomes. As detailed in the project abstract, they include:

1. An increased number of students testing into curricular math courses;
2. Faster, more effective progress toward college readiness for students entering development math;
3. A more robust, efficient, and effective early alert system;
4. Increased engagement with students through Intrusive Advising;
5. Increased faculty/staff engagement in student success efforts;
6. Increased relationship- and technology-facilitated engagement by students in their own academic progress;
7. Increased student persistence and success in curricular studies;
8. Increased graduation rates; and
9. More efficient, timely, and accurate reporting.

The combination of the proposed outcomes will allow institutionalization of project elements and continuous long-term improvement of the entire comprehensive academic and student support system initiative at Camden County College.
Charged with increasing institutional competitiveness in the face of limited resources, Washington Adventist University (WAU)’s president created a vision for strategic restructuring named The Plan. To support the initiative to revitalize brand reputation through improved student outcomes, WAU engaged Hanover’s research services to analyze data and deliver recommendations on the action-items within the plan.

**Approach: Determine high-impact, low-cost, targeted change to guide institutional planning**

Over the course of a three-year partnership, Hanover has collaborated with WAU on over thirty-eight projects pertaining to high-impact, feasible solutions geared at enabling a culture of excellence at WAU. Hanover Research produced actionable insights and concrete recommendations for WAU by:

- Increasing its competitive status within the higher education landscape through increased grantseeking and funding;
- Analyzing graduate and employee satisfaction surveys, learning outcomes, and enrollment data to guide The Plan’s strategic goals;
- Generating new ideas for curriculum innovation, enhanced support services, and institutional structure and development.

**Result: Improvements in student outcomes and brand perception**

WAU has succeeded in implementing vast institutional improvements since The Plan’s launch. The University is now on sound fiscal ground due to a host of revitalized outcomes and enhanced offerings which have increased retention rates to 72% and graduation rates by 40% within the last five years. The solutions facilitated by Hanover equipped WAU with the insight needed to guide this transformation.
STRATEGIC PLANNING STAKEHOLDERS SURVEY

Often, universities seek to include key stakeholder groups in the development of a strategic plan by conducting stakeholder surveys to gather information on the direction of the institution. Universities often strive to include key stakeholders in the strategic planning process by conducting surveys that illuminate stakeholder perceptions of the institution. Hanover takes a proven approach to stakeholder surveys, displayed in the profile below, which demonstrates how a thoughtful, institution-specific survey can support a comprehensive strategic plan.

Purpose

To solicit stakeholder feedback during a strategic planning process, we construct multiple stakeholder surveys. Designed to generate support for the strategic planning process among constituencies at a partner institution, these surveys also identify areas of high need and importance for further consideration in the planning process. To achieve both aims, the surveys ask university stakeholders a series of questions about the current state and future direction of the university. The wording of survey items makes explicit the university’s intent to reflect and act upon stakeholder feedback.

Target Audiences

Postsecondary institutions must consider many constituencies when creating strategic plans. This is especially true of public institutions, which have particular obligations to the residents of their states. Hanover’s best practice research shows that the most commonly identified stakeholder groups include faculty, trustees, alumni and friends, staff, and students. However, we find that constituencies may be more numerous than these groupings suggest. For example, academic units contain administrators (such as deans) in addition to faculty, and non-academic units may also have administrators with perspectives different from the views of staff. Furthermore, local business and community leaders may also be key stakeholders. Based on this knowledge of key constituencies and the understanding that ideal survey respondents depend largely on the unique needs of each institution, Hanover often designs separate surveys for multiple constituencies: students; alumni and friends of the university; parents; employers and community stakeholders; and faculty, academic administrators, and staff. These constituencies are shown in the image below.
Survey Instrument Themes

In order to account for the differing perspectives and experiences of the target audiences (e.g., students vs. faculty, administrators, and staff), we construct separate survey instruments for each audience. Most of the content areas overlap across the instruments, but the surveys differ with respect to a few items that are unique to each audience. Each survey instrument contains items covering three broad themes or domains, including mission, goals, and governance and leadership. Each theme is designed to aid our partner in answering a particular set of questions central to the strategic planning process:

- How much does the university need to change to ensure fidelity to its unique mission? Which elements of the university’s operations are aligned with its mission, and which are not?
- What goals do university stakeholders regard as the highest priorities? Which goals are prioritized by university leadership but not by other stakeholders?
- Do stakeholders believe that university leaders are responsible stewards of the university’s resources? Do stakeholders trust the university’s leadership to guide the planning process?

In addition to these three themes, the survey for faculty, administrators, and staff asks respondents to answer questions about the university’s resources. These items identify the resources and processes that may require review during future phases of strategic planning. The survey instruments for students, alumni and friends, and parents include targeted questions about academic and student life. Finally, the survey instrument for employers and community stakeholders features questions about students’ career preparedness. Each survey instrument concludes with two questions about respondents’ further participation in the strategic planning process. These items aim to generate buy-in through demonstrating the university’s commitment to continued engagement with stakeholders. In addition, these items identify individuals who would like to be involved with future phases of planning and enable the university to determine the best means to communicate with stakeholders about the planning process.

In summary, during the process of creating stakeholder surveys as a component of a strategic planning process, several key steps must be taken. First, you must understand the key stakeholder audiences. While there are often commonalities among institutions, it is important to explore unique constituencies to ensure that all stakeholder groups are included in the research. Upon determining the target audiences, each survey must be tailored to meet the needs of the target audience, including questions that pertain to that specific audience as well as ensuring that the language and tone used in the survey pertain to and will be understood by the target audience.
Survey Instrument Themes (cont’d)

As Hanover Research constructs stakeholder surveys, careful planning, including thoroughly understanding the target audiences and ensuring that each stakeholder survey is tailored towards the target audience group, ensures that the results of the surveys will be more informative and ultimately beneficial to our partners as they embark on their strategic planning processes.

As a helpful guide for administrators exploring surveys from key stakeholder for strategic planning purposes, we are providing a sample survey questionnaire designed to elicit feedback from administration, faculty, and staff.

Interested in downloading our free strategic planning stakeholder survey? Visit www.hanoverresearch.com/media/Strategic-Planning-Stakeholder-Survey.pdf

BEST PRACTICES FOR EXECUTING RESEARCH

Have questions about performing a stakeholder survey at your institution? If you have questions or would like expert assistance, e-mail info@hanoverresearch.com to speak with a higher education research director.
USER-FOCUSED WEBSITE CUSTOMIZATION

In addition to higher education, Hanover Research serves more than 15 major industries, and that number continues to grow every year. Our standing website had thousands of webpages, yet only a fraction of them were relevant to each distinct industry. Seeing that our breadth of content was becoming unwieldy, we recognized the need for a website that could provide a customized experience for visitors and one that could scale up with our continued growth. Thus, we sought to improve website usability by: through visitor self-selection, developing industry-specific mini-sites in order to tailor content and messaging to the priorities of each audience.

We hope that the new www.hanoverresearch.com achieves the customized experience we looked to provide, and we invite you to peruse the higher education pages of the site to see how your peers are using research to make informed decisions.

Higher education site features three main sections:

Hanover Model
How a partnership with Hanover works

Solutions
Our areas of expertise in research and grant proposal development for community and technical colleges, 4-year colleges and universities, and law and other professional schools

Insights
The latest in higher education trends, research, and news

Insights section features:
Monthly research reports
Recent case studies
Newsletter archives
Higher education partner profiles, testimonials, and more!

VISIT WWW.HANOVERRESEARCH.COM
EVOLUTION TO SOLUTION-DRIVEN COMMUNICATIONS

Until recently, we presented our services from a research-approach standpoint: survey design, administration, and analysis; data analysis; program evaluation; peer benchmarking; and literature review. While these are some of the research techniques we utilize, we wanted to communicate more effectively how our work addresses common and critical challenges for higher education institutions, and how, as long-term partners, we deliver research and recommendations until specific goals are attained. Toward that end, we conducted an exhaustive review of the challenges facing our partners and mapped those to the associated research deliverables we provide that serve as solutions to those challenges. The results of our efforts are detailed below.

How we now communicate the research and grants expertise we offer to higher education administrators:

**RESEARCH**
- Recruiting & Marketing Strategy
- Tuition Management
- Enrollment Management
- Marketing Effectiveness
  - Rankings Position Assessment
  - Brand Performance
  - Targeted Marketing & New Campus Feasibility

**Academic Program Management**
- Labor Market Outlook
- Competitor Program Profiles
- Student Demand
- New Program Viability
- Program Portfolio Assessment
- SWOT Analysis
- Program Review

**Institutional Effectiveness**
- Student Performance
- Student Satisfaction Analysis
- Student Retention
- Accreditation Support

**Community & Alumni Engagement**
- Employer Relations
- Public Perception
- Economic Impact Assessment
- Alumni Engagement

**Resource Management**
- Employer Relations
- Public Perception
- Economic Impact Assessment

**GRANT PROPOSAL DEVELOPMENT**
- Capacity Building & Pre-Proposal
  - Grantseeking Strategy
  - Grant Alerts
  - RFP Analysis
  - Funding Prospect Research
  - Relationship Building Strategies

**Proposal Development**
- Concept Development
- Program Design Consulting
- Federal Proposal Production
- Foundation Proposal Production

**Review & Post-Award Support**
- Grant Application Renewal & Review
- Proposal Review & Rewriting
- Grant Outcomes Reporting
PARTNERING WITH AMERICAN COUNCIL ON EDUCATION

Hanover Research is pleased to announce a new affiliation with American Council on Education, the nation’s most influential, respected, and visible higher education association. ACE represents the presidents of U.S. accredited, degree-granting institutions, which include two- and four-year colleges, private and public universities, and nonprofit and for-profit entities. In its role representing all sectors of higher education, ACE provides higher education administrators multiple opportunities to learn from colleagues and experts. Through this work, ACE is helping to grow the next generation of higher education leaders.

In support of ACE’s mission, Hanover Research is providing selected white papers and case studies for download through ACE’s new Thought Leadership Library. Hanover’s work will offer research-backed insights into key issues, such as leadership development, education attainment, internationalization and global engagement, and diversity in higher education.

For more information about ACE membership, email membership@acenet.edu.

2014 U.S. NEWS COLLEGE RANKINGS RECONSTRUCTED

Hanover Research carefully reconstructed the U.S. News and World Report (USNWR) Best Colleges rankings, allowing us to tell partners the exact changes in scores necessary to ascend in the rankings. Our Reconstruction Tool provides an extensive analysis of the factors affecting an institution’s rankings and those of its peers, the scores of the institution compared to all other ranked institutions, and strong recommendations for how to influence rankings.

Hanover Research offers the Tool to help our higher education partners determine the exact steps they need to take to boost their ranking for the following years. In addition to the expertise partners gain, they receive:

- Competitive Intelligence: Based on our analysis of rankings across several years of competitors, partners can improve benchmarking capabilities at a regional/national level.

- Ranking Driver Impact: Our reconstruction tool interactive spreadsheet enables partners to enter new values for ranking variables and examine the projected change in rank.

Partner Testimonial:

“Hanover Research’s Reconstruction Tool provided us with deep understanding of the U.S. News college ranking system, an extensive market analysis of the factors affecting my institution’s rankings and those of our peers, and strong recommendations for how to influence our rankings most effectively.”

Other Rankings Reconstructed by Hanover Research:

- USNWR Best Law Schools
- USNWR Best Business Schools
- USNWR Top 400 World Universities
- QS World University Rankings
- BusinessWeek Business School Rankings

Interested in learning more about our rankings tools? E-mail us at info@hanoverresearch.com.
WHO WE’RE FOLLOWING

The following is a selection of people and organizations we follow to stay on top of leading higher education innovations and trends.

TWITTER INFLUENCERS

@ChangeHigherEd
Powerful forces such as economics, politics, demographics, religion and technology will change universities in significant ways over the next few decades. Professor Lloyd Armstrong analyzes which forces will have the most impact, and how to leverage them effectively.

@caseadvance
Join the Council for Advancement and Support of Education’s CASESMC chat bi-monthly to engage with higher education marketers, and discuss the latest issues in social media and advancement.

@rclemmons
Just as cross-industry expertise gives Hanover the ability to bring new ideas to other customer sectors, Raechelle Clemmons’ background in B2B and B2C companies gives her an advantage to think outside of the box as CIO of St. Norbert College. Follow her and engage about the latest in ed tech.

@EdTech_HigherEd
What issues are higher education institutions facing as they evaluate and adopt new technologies? Follow EDTECH to get the up-to-date tweets on challenges and more importantly, the solutions.

@ACEducation

BLOGS

Management & Strategy in Higher Ed
www.higheredmanagement.net
Dr. Keith Hampson’s blog lays down the bridge between higher education and digital technology. A pragmatic strategist, he teaches institutions to build scalable and effective products, services, and organizations.

The College Puzzle
collegepuzzle.stanford.edu
Professor Michael Kirst of Stanford University is a prolific writer on higher education. Linking often to other articles, he uses The College Puzzle to engage readers about top issues today.

Brian Leiter’s Law School Reports
www.leiterlawschool.typepad.com
Law school deans around the nation follow Professor Brian Leiter of University of Chicago Law School, quite possibly one of the most active bloggers of law school happenings.

Community College Spotlight
communitycollegespotlight.org
Joanne Jacobs manages this blog for the Hechinger Institute at Teachers College, Columbia U. A former community college student herself, she uses the site to discuss and debate community college issues.

collegewebeditor.com
Karine Joly manages collegewebeditor.com, a site dedicated to higher education online marketing and replete with resources, news, and online learning courses.
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**MEDIA**

Melissa Korn at The Wall Street Journal
www.wsj.com
Melissa covers higher education for the Wall Street Journal with a special focus on business schools, undergraduate and graduate admissions, financial aid, academics and administrative news worldwide.

Doug Lederman (@douglledlHE) at Inside Higher Ed
www.insidehighered.com
Doug is just as vigilant in leveraging his twitter account to broadcast news as he is of ensuring high-brow education journalism at Inside Higher Ed. Follow Inside Higher Ed’s news through the Editor’s discerning eyes.

Katherine Mangan at The Chronicle of Higher Education
www.chronicle.com
Katherine has been at the Chronicle since 1986 and focuses on community colleges, professional schools, college completion and work-force issues.

Phil Baty (@Phil_Baty) at Times Higher Education
www.timeshighereducation.co.uk
As Editor at Large of Times Education, Phil knows what’s ticking in higher education not only in the UK, but also all around the world.

Josh Freedman at Forbes
www.forbes.com
Contributor Josh Freedman covers political economics of higher education and focuses on topics such as financial aid programs, tuition, and higher education finance.

Julie Hare (@harejulie) at The Australian
www.theaustralian.com.au
Julie Hare, Editor of The Australian Newspaper’s Higher Education section, has been covering higher education journalism for over 15 years. Follow her to cover global education issues.
Hanover Research is a global market research firm providing knowledge support to both for-profit and non-profit organizations. Through our unique, fixed-cost model, we deliver customized, timely, and authoritative research and advice enabling our clients to make informed decisions, identify and seize opportunities, and heighten their effectiveness.

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A go-to source for the latest in higher education research

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Where you can learn who’s who and what’s new at Hanover

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