

# **The Strategic Enrollment Planning Imperative: Higher Education Past and Present**

Wes Butterfield, Chief of Consulting Services

# Ensuring Strategy

## Strat·e·gy

The science and art of employing the political, economic, social, technological, legal, and environmental factors

## Plans

A series of actions or steps, project overviews, timelines, deliverables, budgets, and responsibilities

- ***Good Strategic Plans are not comfortable***—they are designed to help the organization achieve specific goals over the long term to achieve mission and maximize success. They typically are not "comfortable."



Behind me is infinite power. Before me is endless possibility, around me is boundless opportunity. My strength is mental, physical, and spiritual.

**Quote by 50 Cent**



# Top Priorities for College and University Leaders in 2025

- Enrollment declines
- Financial constraints
- Retention/student success
- Market perception/Brand position
- Technology and infrastructure
- Campus hiring and employee retention
- Policy/Regulatory changes
- Program adoption/Innovation and restructuring
- Advancement and fundraising

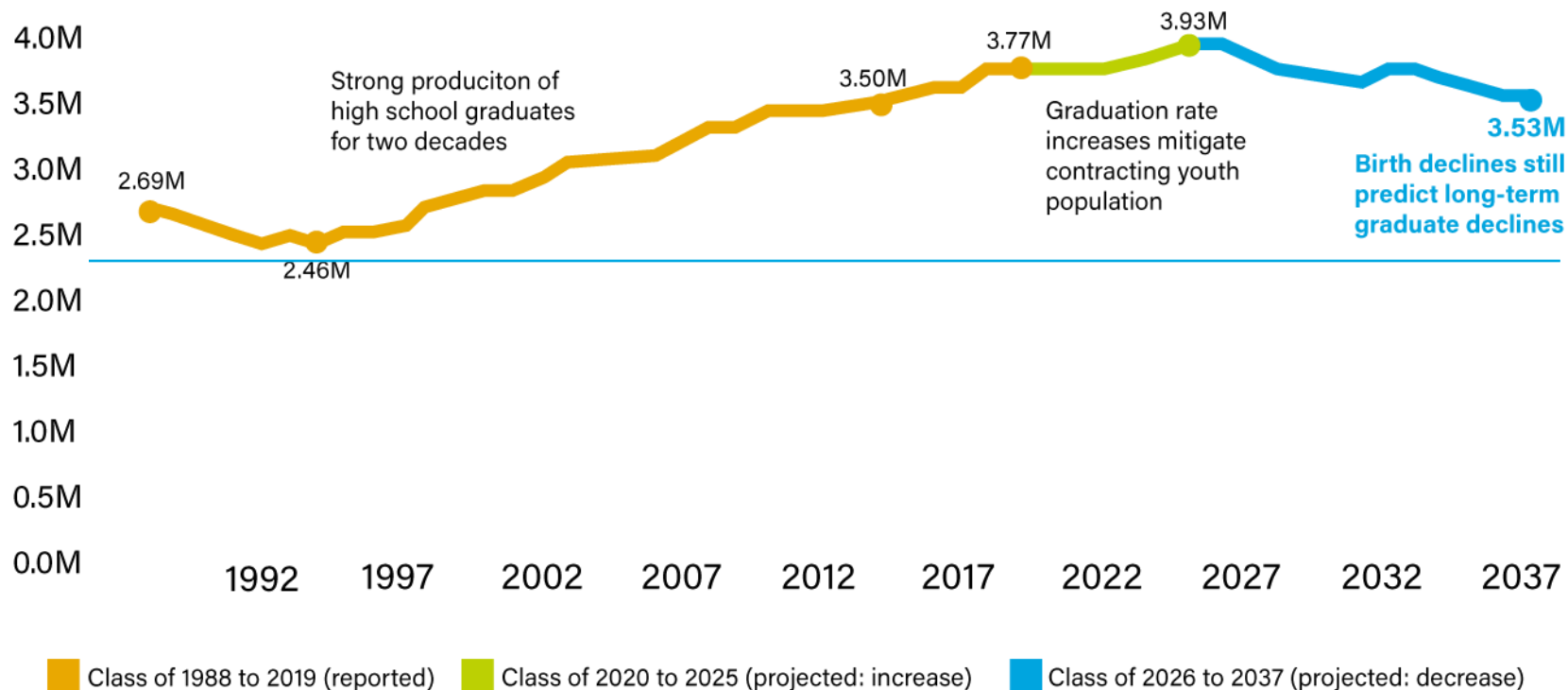


# **Enrollment Declines and Demographics Are Shifting**



**1**

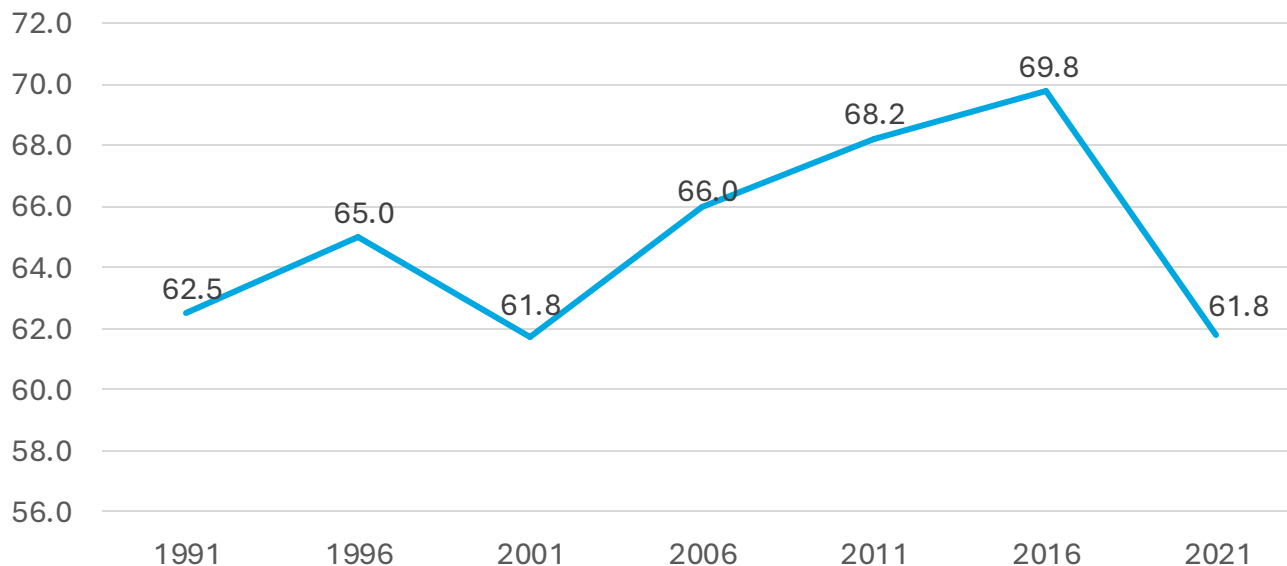
# Slowing Growth in Number of U.S. High School Graduates, Then Decline (U.S. Total High School Graduates)



Source: Western Interstate Commission for Higher Education, *Knocking at the College Door*, 10<sup>th</sup> edition, 2020. See Technical Appendix for detailed sources of data through the Class of 2019: WICHE projections, Class of 2020 through 2037.

# College Participation Rates Had Been A Key Growth Driver

Percentage of recent high school completers enrolled in college

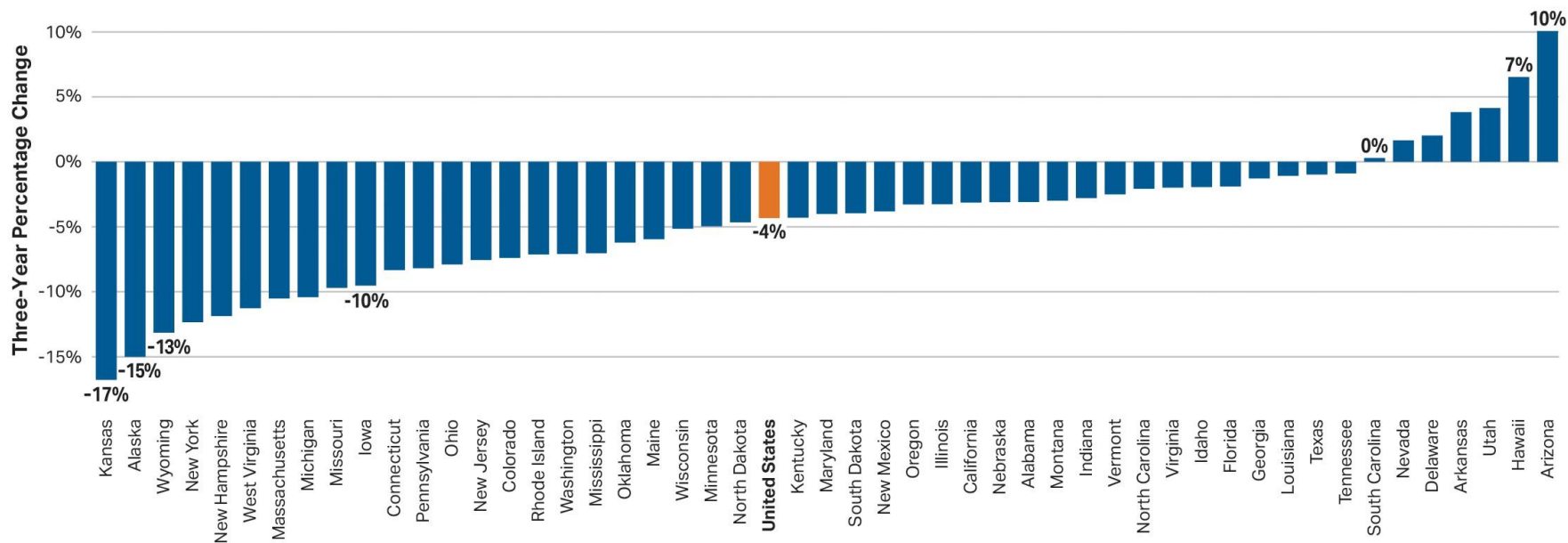


# Postsecondary Fall Enrollment by Sector, Attendance Status, and Level of Enrollment: 2019 to 2022

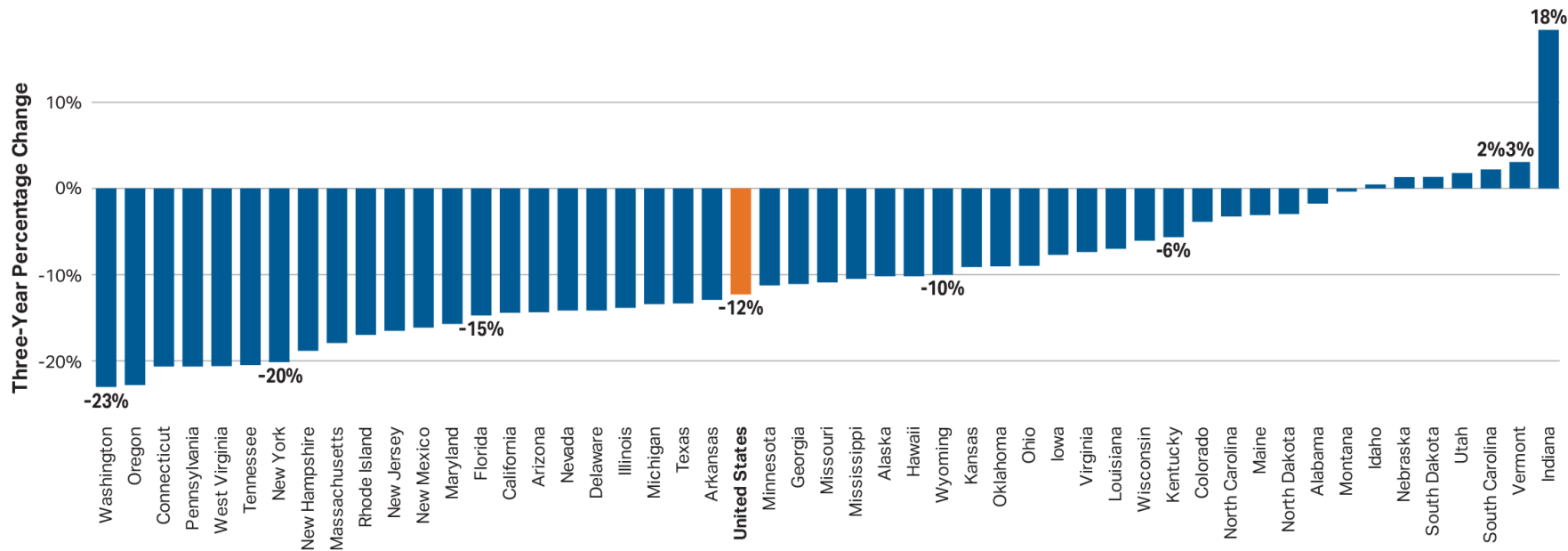
		Full-Time Undergraduate	Part-Time Undergraduate	All Graduate	Total
Public Two-Year	2019	2,410,000	4,441,000	—	6,851,000
	2020	2,160,000	4,069,000	—	6,229,000
	2021	1,957,000	4,011,000	—	5,968,000
	2022	1,965,000	4,041,000	—	6,006,000
Public Four-Year	2019	4,989,000	1,162,000	1,496,000	7,647,000
	2020	4,898,000	1,194,000	1,543,000	7,635,000
	2021	4,781,000	1,196,000	1,595,000	7,572,000
	2022	4,727,000	1,169,000	1,586,000	7,483,000
Private Nonprofit Four-Year	2019	2,216,000	463,000	1,337,000	4,015,000
	2020	2,161,000	471,000	1,355,000	3,987,000
	2021	2,165,000	464,000	1,384,000	4,013,000
	2022	2,144,000	485,000	1,366,000	3,994,000
For-Profit	2019	508,000	251,000	233,000	991,000
	2020	529,000	259,000	236,000	1,024,000
	2021	530,000	248,000	226,000	1,003,000
	2022	514,000	242,000	221,000	978,000



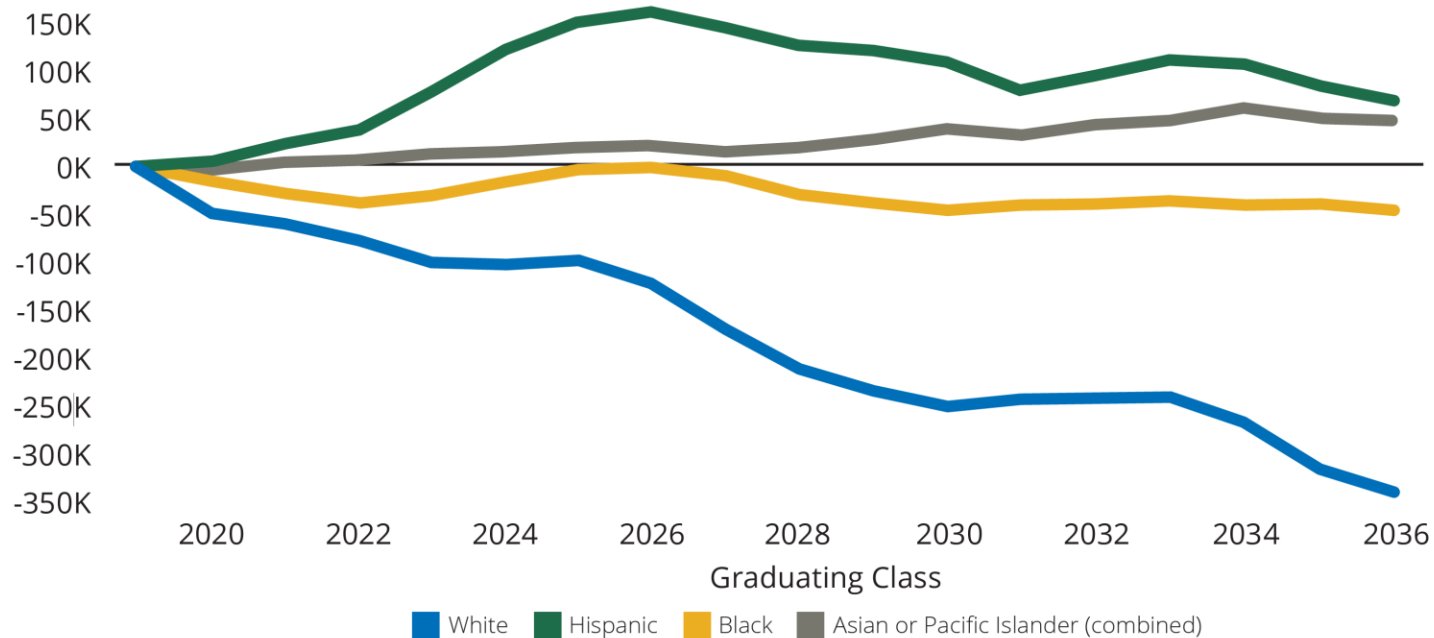
# Fall 2019 to Fall 2022 Three-Year Percentage Change in Total Undergraduate Enrollment at Public Four-Year Institutions (by State)



# Fall 2019 to Fall 2022 Three-Year Percentage Change in Total Undergraduate Enrollment at Public Two-Year Institutions (by State)



# Projected Change in Number Among U.S. Public High School Graduates Compared to 2019

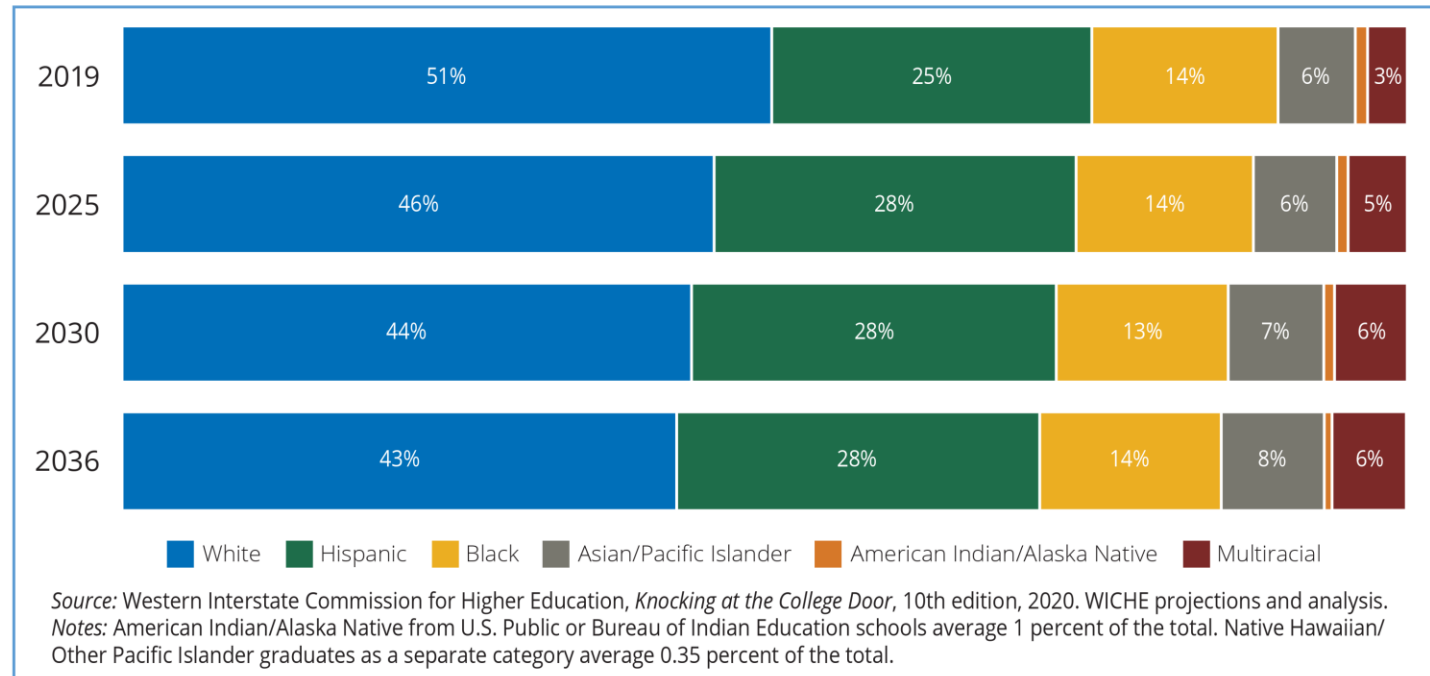


Source: Western Interstate Commission for Higher Education, *Knocking at the College Door*, 10th edition, 2020. WICHE projections and analysis.

Notes: Showing White non-Hispanic, Hispanic of any race, Black non-Hispanic and Asian/Pacific Islander (combined) non-Hispanic. Figure 5a shows additional race categories.

# Like the Rest of Society, Higher Education Enrollment Will Continue to Become More Diverse

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





By 2030, the number of internationally mobile students will grow from 6 million in 2023 to more than 10 million.

### **Outlook 2030 Brief—The U.S. and International Education**

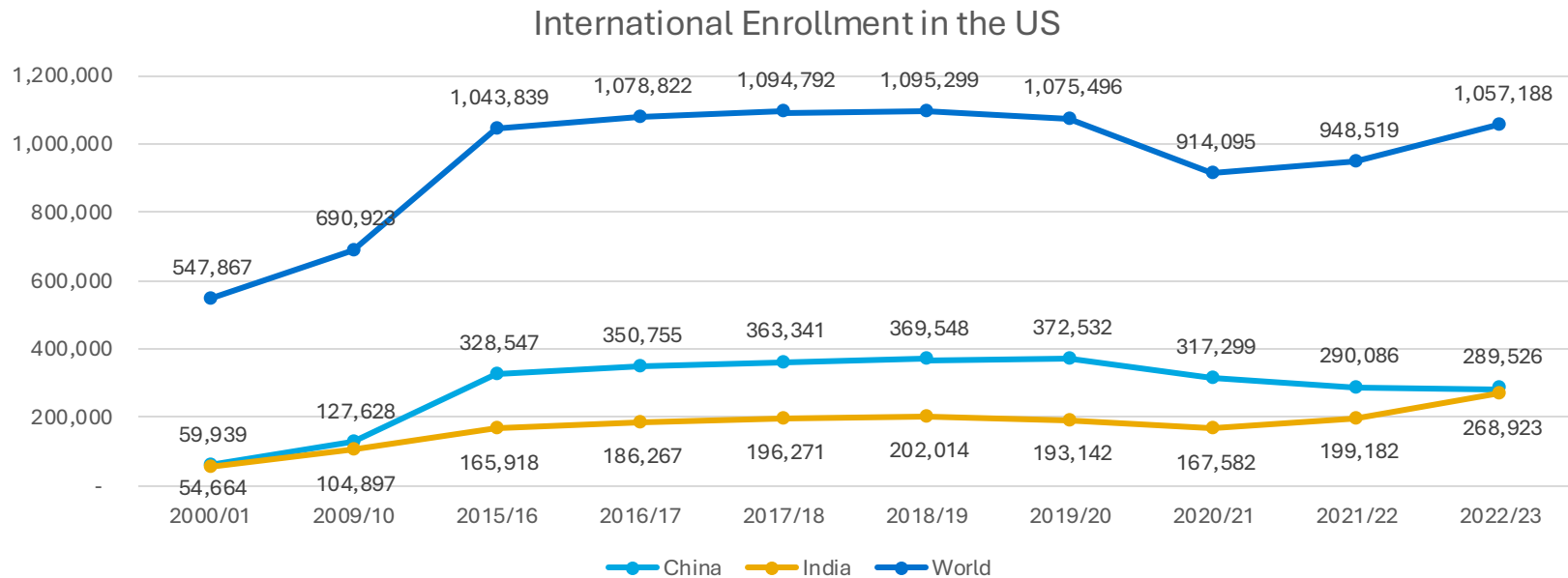
# International Students Come From Every World Region

International students study in the US from over 210 places of origin



# International Enrollment in U.S. Institutions

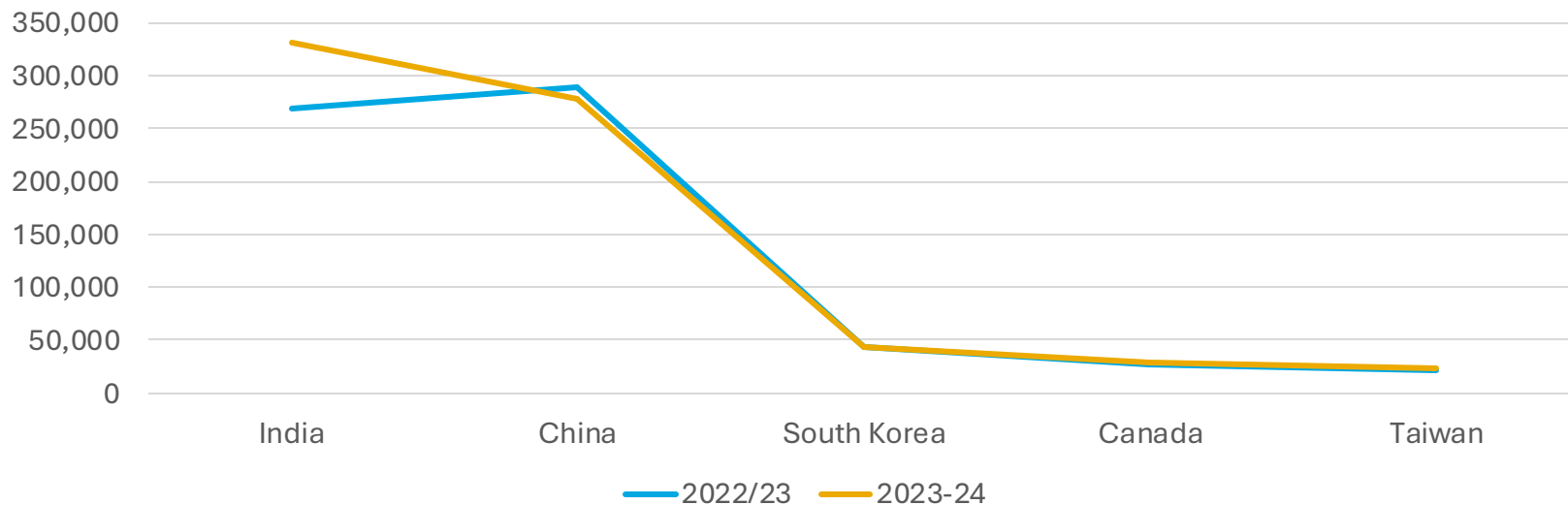
We were off by less than 40k from our all-time high



# International Enrollment in U.S. Institutions

The world total increased 6.6%—surpassing past highs

Places of origin of International Students





# Implications of Enrollment Decline and Demographic Shift

- Do you understand the market segments, market potential, and market share for your institution?
- Have you set realistic goals given the market pressures? Understand the data for your market?
- How have you investigated new market segments? Is it a realistic plan driven by data?
- Are you creating a welcoming environment and segmented recruitment tactics, and strategies?
- What are you doing to capitalize on the specialized areas of graduate programs, certificated programs, and international students?
- What adjustments, if any, have you employed in online offerings?



# **Financial Constraints**



**2**

# What everyone is talking about...

≡ **Newsweek**

**Politics**

Department Of Education

Donald Trump

Federal Government

Students

Student Loan Forgiveness

Student Loan Debt

Linda McMahon

## How FAFSA Functions Under the Department of Education as Trump to Cut Agency

Published Mar 20, 2025 at 3:41 PM EDT

Updated Mar 20, 2025 at 4:17 PM EDT

# What else are they talking about...

FOX BUSINESS Personal Finance • Economy • Markets • Watchlist • Lifestyle • Real Estate • Tech • Video • Podcasts • More

Market expert reveals what's making him bullish on travel... Real estate influencer shares tips for millennials, Gen Z to... Stranded NASA astronauts prepare to return home after... Shift to older Americans to blue collar jobs 'more necessary than boom'...

Ad by CRITEO

Report this ad

Ad choices

COLLEGE Published July 8, 2024 2:46pm EDT

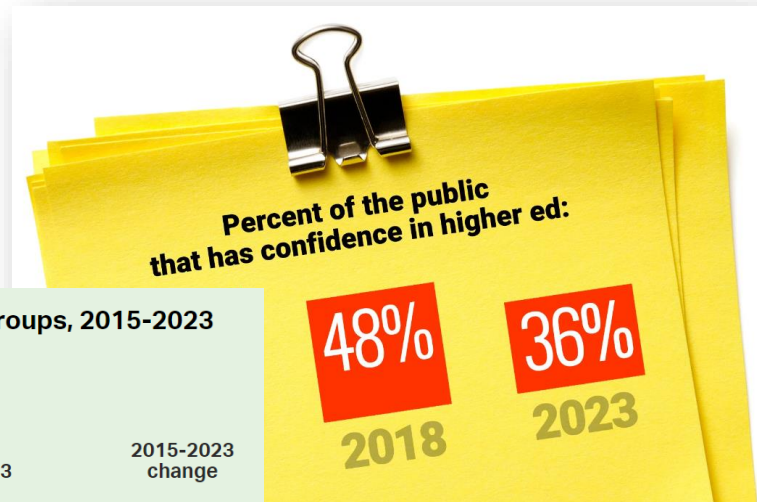
## Americans' confidence in higher education drops 21 points since 2015

Poll of US adults shows growing concerns over political agendas being pushed on college campuses – and whether the cost is worth it

### Long Demographic Groups, 2015-2023

Confidence in higher education

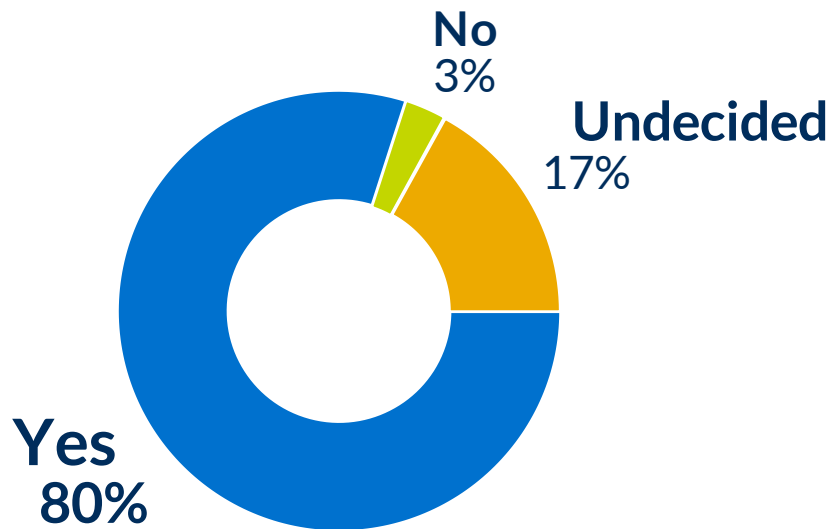
	2015 %	2018 %	2023 %	2015-2023 change pct. pts.
<b>Party identification</b>				
Republicans	56	39	19	-37
Independents	48	44	32	-16
Democrats	68	62	59	-9
<b>Education</b>				
No college degree	54	45	29	-25
College degree only	57	50	47	-10
Postgraduate degree	67	60	50	-17



# Implications of Economics Within Higher Education

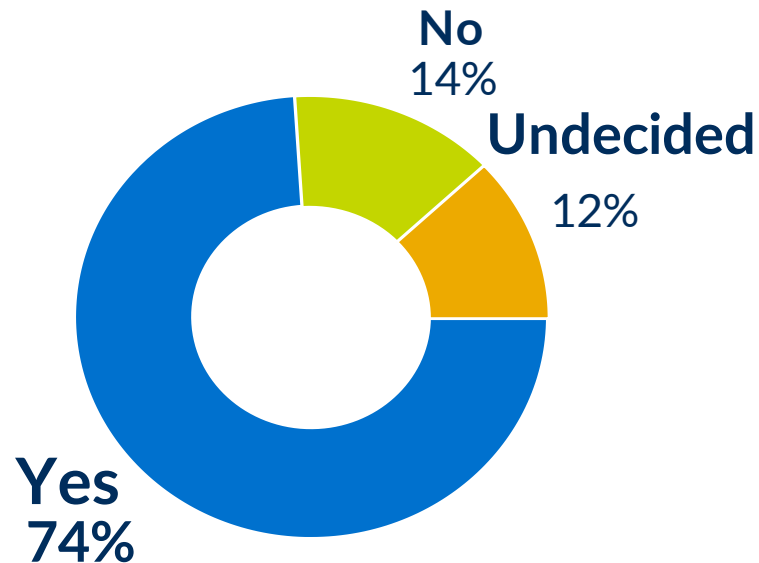
- Do you have a detailed understanding of NTR and all revenue sources for planning and proper goal setting?
- Families are more cost-conscious than ever, including more averse to loans. What measures can we take to overcome this mentality?
- Are you ramping up conversations with state and local agencies that may have more future control of funding streams?
- How familiar are you with which investments are netting the best return on investment (ROI) to meet revenue goals?
- How well are you working with, or partnering with, your advancement colleagues to support your enrollment initiatives?

## Prospective Family Perceptions of Tuition Paid as a Worthwhile Investment



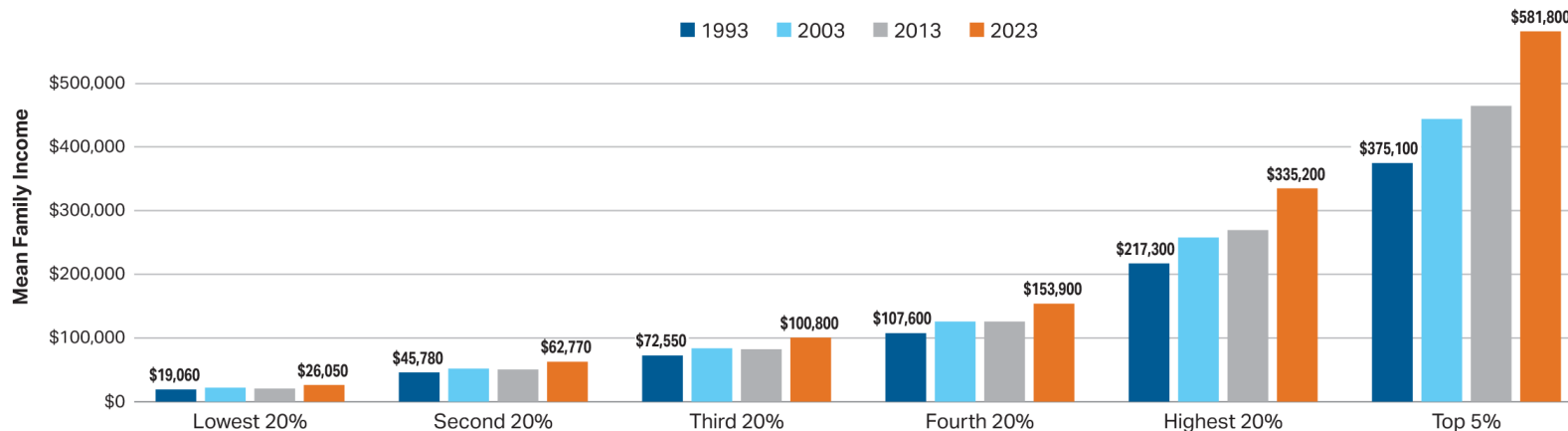
RNL, Ardeo, & CampusESP (2024). *2024 Prospective Family Engagement Study*. Ruffalo Noel Levitz

## University Family Perceptions of Tuition Paid as a Worthwhile Investment



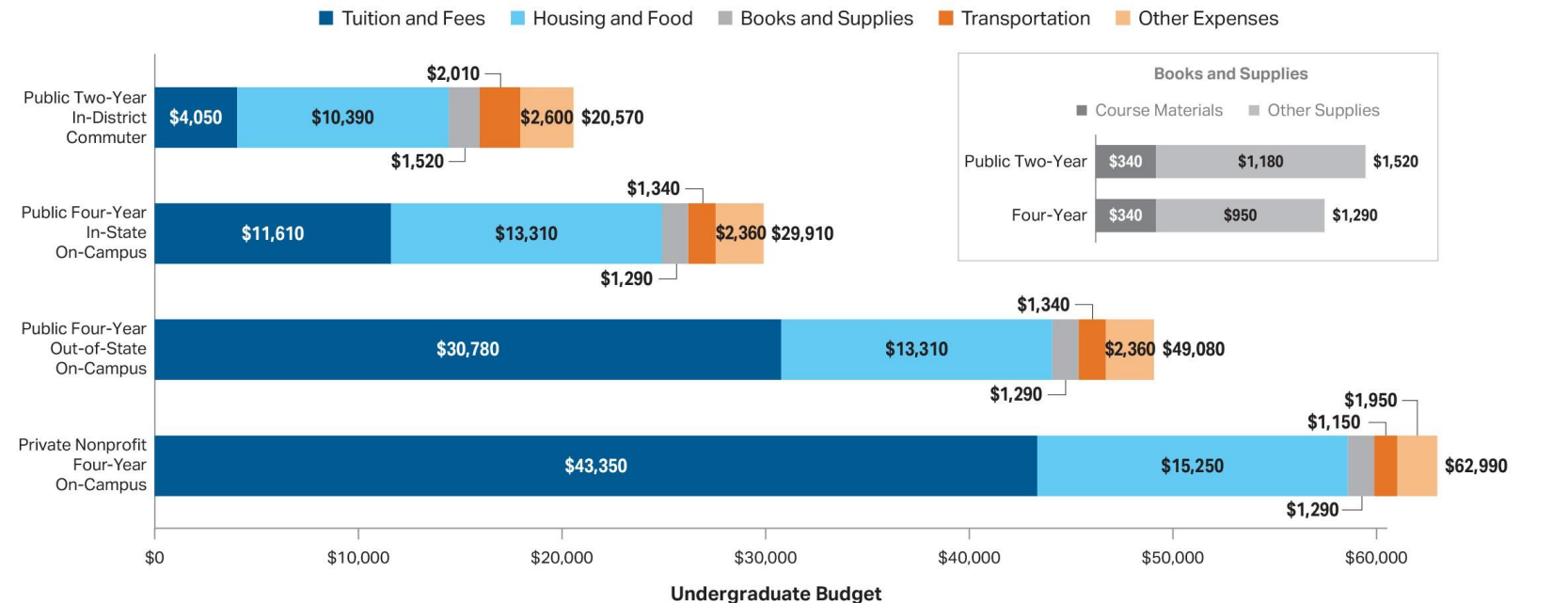
Source: RNL & CampusESP (2024). *2024 University Family Engagement Study*. Ruffalo Noel Levitz

# Mean Family Income in 2023 Dollars by Quintile, 1993, 2003, 2013, and 2023



	Lowest 20%	Second 20%	Third 20%	Fourth 20%	Highest 20%	Top 5%
\$ Change from 1993 to 2023	\$6,990	\$16,990	\$28,250	\$46,300	\$117,900	\$206,700
% Change from 1993 to 2023	37%	37%	39%	43%	54%	55%
2023 Income Bracket	\$46,000 or Less	\$46,001 to \$80,540	\$80,541 to \$122,700	\$122,701 to \$194,600	\$194,601 or More	\$356,800 or More
2023 Mean Income	\$26,050	\$62,770	\$100,800	\$153,900	\$335,200	\$581,800

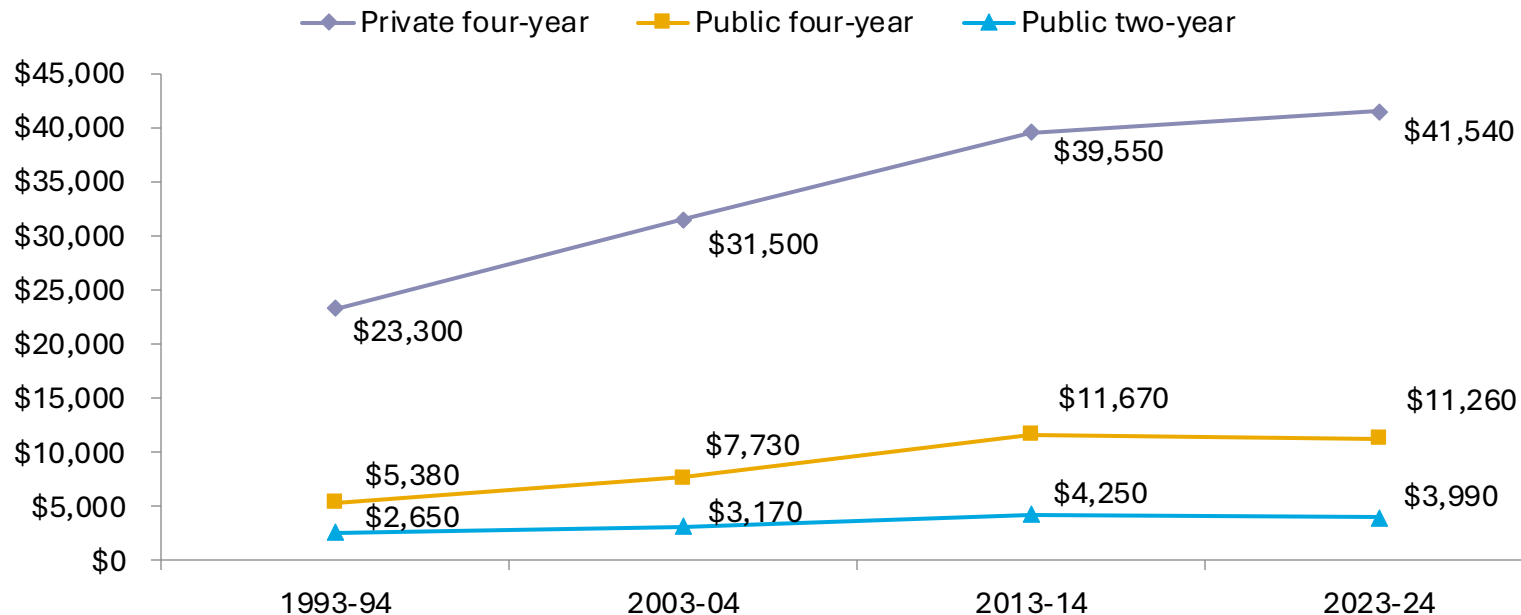
# Average Estimated Full-Time Undergraduate Budgets (Enrollment-Weighted) by Sector, 2024-25





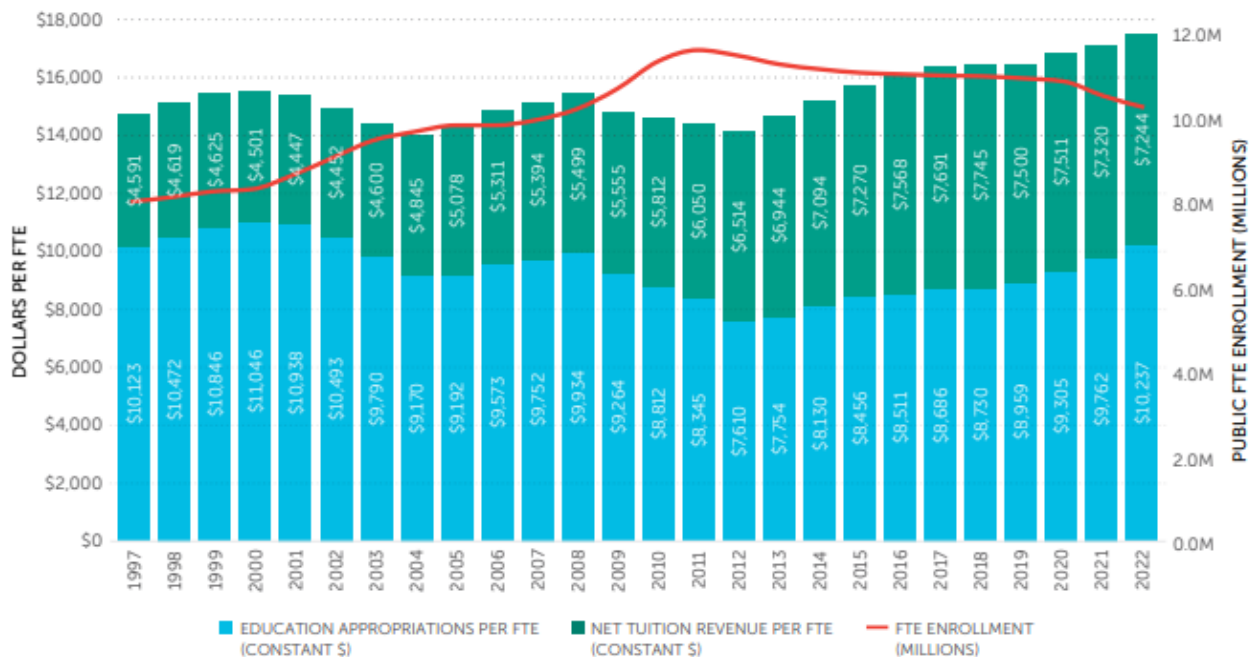
# Average tuition and fee charges in constant dollars

1993-94 to 2023-24 (enrollment weighted)



# Public FTE Enrollment, Education Appropriations per FTE, and Net Tuition Revenue per FTE, U.S., FY 1996-2021(Constant Dollars)

PUBLIC FTE ENROLLMENT, EDUCATION APPROPRIATIONS PER FTE, AND NET TUITION REVENUE PER FTE, U.S, FY 1997-2022 (CONSTANT DOLLARS)



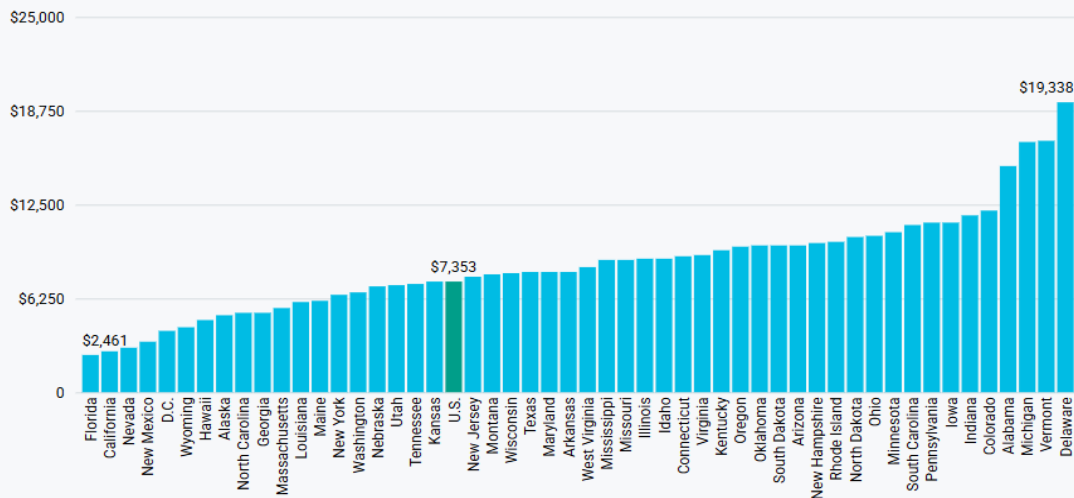
# Public Higher Education Net Tuition Revenue per FTE by State, FY 2023 (Adjusted)

FIGURE 4.1

Public Higher Education Net Tuition Revenue per FTE by State, FY 2023 (Adjusted)

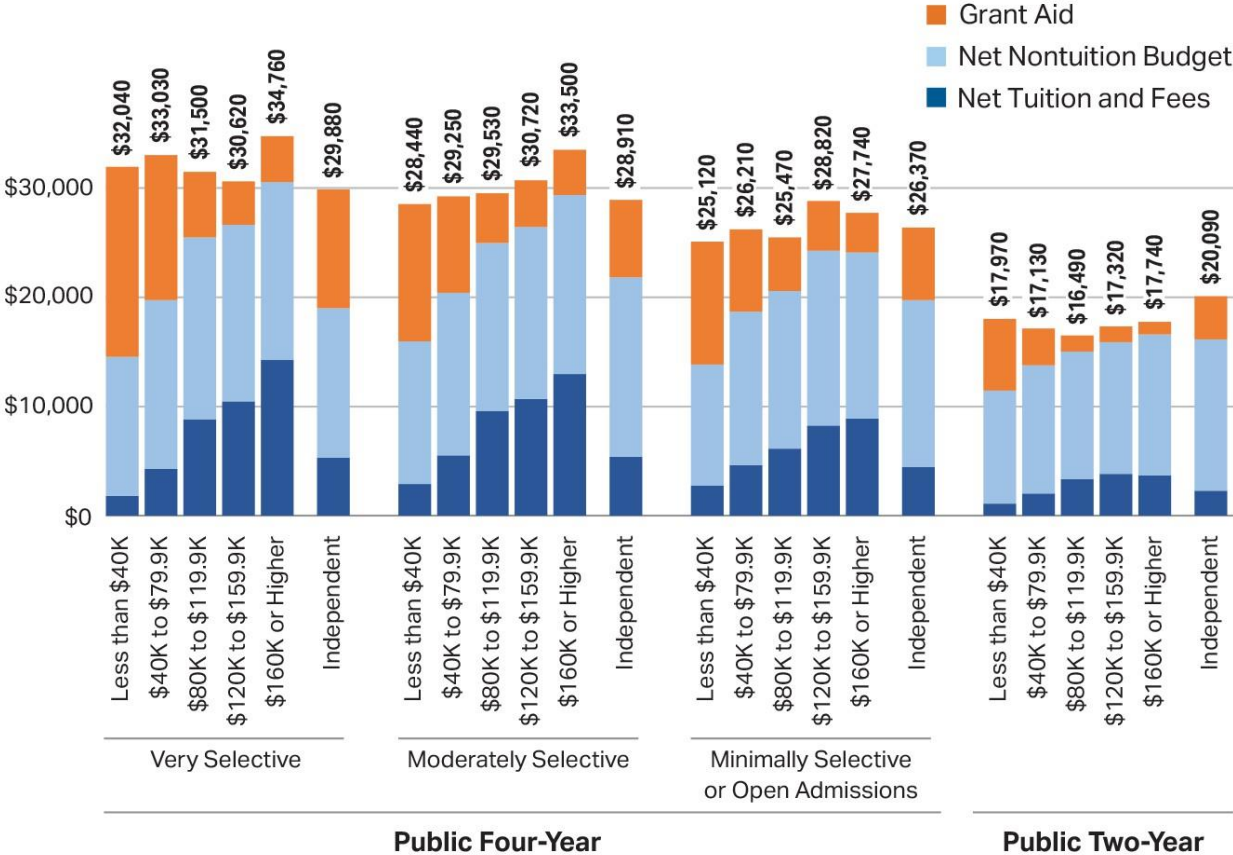
Share Save

Net Tuition Revenue per FTE



# Average Net Tuition and Fees, Net Nontuition Budget, and Grant Aid by College Selectivity, Dependency Status, and Parents' Income of Dependent Students, 2019-20

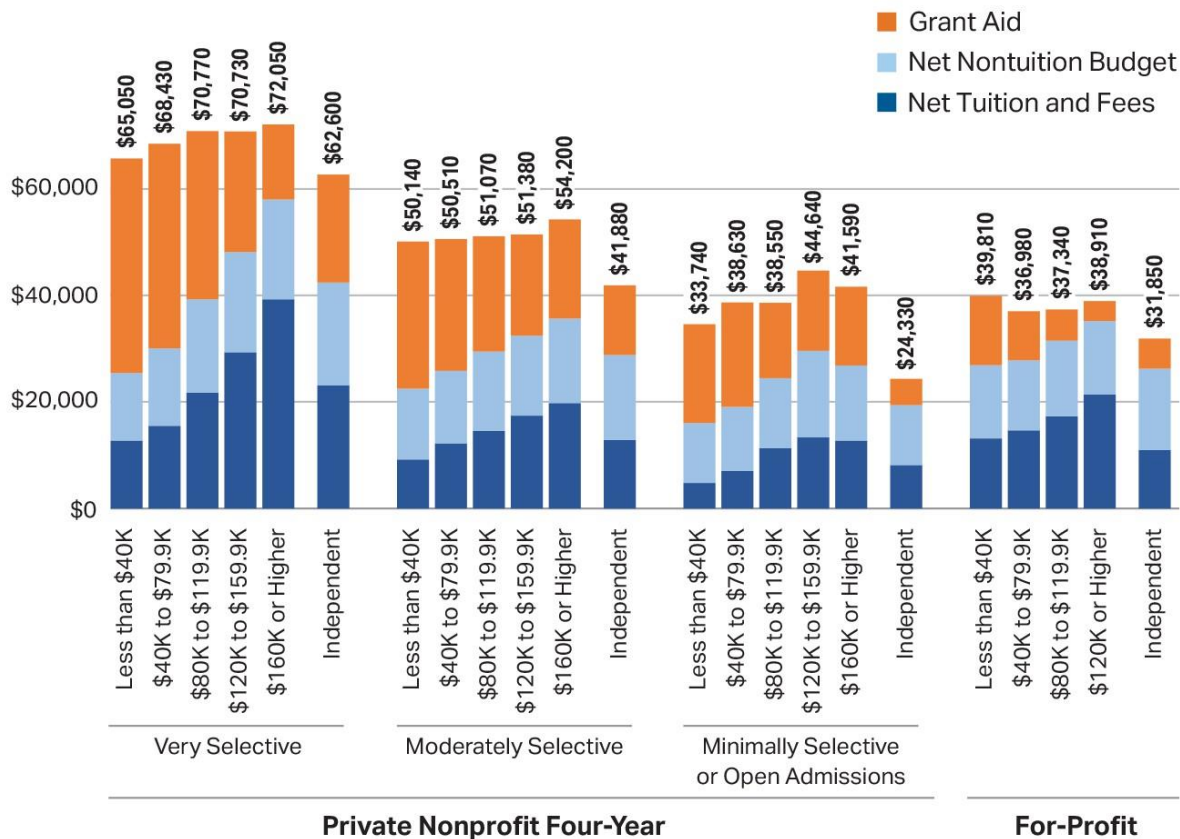
## Public Institutions



© Copyright 2025 College Board. Trends in College Pricing 2024. All rights reserved.  
 Reprinted with permission. This material may not be posted, published, or distributed without permission from College Board.

# Average Net Tuition and Fees, Net Nontuition Budget, and Grant Aid by College Selectivity, Dependency Status, and Parents' Income of Dependent Students, 2019-20

## Private Institutions



# Donor Participation Has Been in Decline

Overall giving also fell since the pandemic

OVER THE LAST DECADE

**70%** of  
institutions  
experienced a  
**decline in donor  
counts**, with an  
**average loss  
of 30%**



EDUCATION GIVING DOWN

**3.6%**  
since the post-  
pandemic  
**record highs**

SINCE THE PANDEMIC

**80%** of  
institutions  
remain **down  
on donors**

# Financial Constraints

- **Declining Enrollment:** Reduced student numbers impact tuition revenue.
- **Reduced Government Funding:** State and federal funding have not kept pace with inflation, forcing campuses to find alternative revenue streams.
- **Rising Operational Costs:** Expenses for maintaining infrastructure, upgrading technology, and hiring quality faculty.
- **Shifting Student Expectations:** Increased demand for financial aid and changing student needs.
- **Economic Challenges:** Economic downturns and donor fatigue affect fundraising efforts.
- **Competition for Philanthropy:** Limited support is available due to competition among institutions.



# **Retention/Student Success**

**3**





Retention is not really the goal of higher education. There is nothing fundamentally, intrinsically academic about retention. Retention is a measurement, a benchmark, of educational attainment. And I would argue, often a minimum one at that. Retention is a C minus and a pulse...This is not sufficiently aspirational.”

—Gardner, J. (2006). “The first-year experience’s first 25 years—the jury is in, but out on the next: You can determine the verdict”

# Most Widely Used Strategies & Tactics for Student Success, Retention, and Completion

## 4-year, Private

1. Academic support (e.g., learning center, math lab, tutoring)
2. Giving students practical work experiences in their intended major (e.g., internships, volunteer work, experiential learning, service learning)
3. Student success coaching (internal)
4. Faculty advising, one-on-one
5. Providing each student with an academic plan/roadmap of courses

## 4-year, Public

1. Academic support (e.g., learning center, math lab, tutoring)
2. Advising by professional staff, one-on-one
3. Student success coaching (internal)
4. Providing support services specifically designed to address mental health
5. Giving students practical work experiences in their intended major (e.g., internships, volunteer work, experiential learning, service learning)

## 2-year

1. Academic support (e.g., learning center, math lab, tutoring)
2. Providing each student with an academic plan/roadmap of courses
3. Advising by professional staff, one-on-one
4. Providing support services specifically designed to address mental health
5. Congratulating, alerting, and nudging system (early alert system)

# Most Widely Used Programs & Strategies Targeted to Specific Populations

## 4-year, Private

1. Programs designed specifically for first-year students (e.g., orientation for first-year students, a first-year experience program)
2. Programs designed specifically for online students
3. Honors programs for academically advanced students
4. Programs designed specifically for international students
5. Programs for student-athletes

## 4-year, Public

1. Programs designed specifically for first-year students (e.g., orientation for first-year students, a first-year experience program)
2. Honors programs for academically advanced students
3. Programs for student-athletes
4. Programs for students with disabilities
5. Programs designed specifically for veterans

## 2-year

1. Programs designed specifically for first-year students (e.g., orientation for first-year students, a first-year experience program)
2. Programs designed specifically for veterans
3. Programs for students with disabilities
4. Honors programs for academically advanced students
5. Programs for student-athletes

# Most Widely Used Management Practices for Optimizing Student Success, Retention, and Completion

## 4-year, Private

1. Assessing what's important to your currently enrolled students to help ensure their satisfaction and success
2. Development of faculty skills in instruction
3. Using student satisfaction assessment data to make changes to address attrition
4. Setting measurable goals for college completion rates
5. Setting measurable goals to improve the retention rate from term-to-term or year-to-year

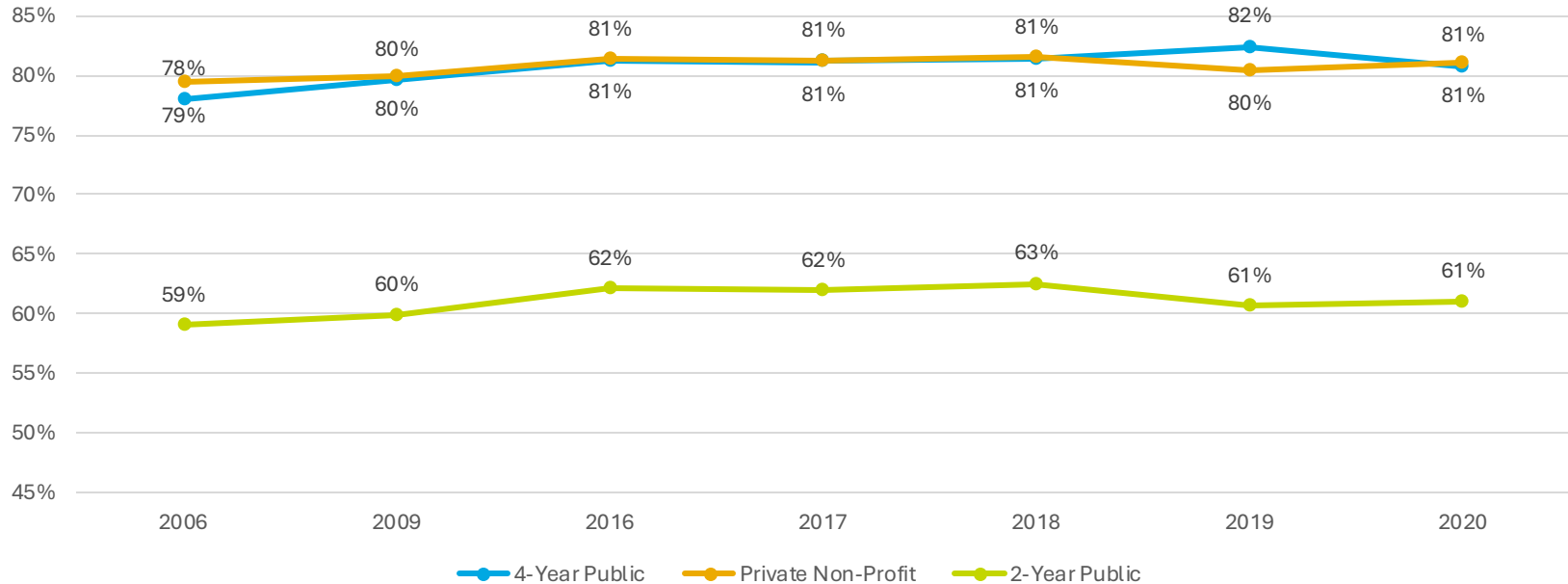
## 4-year, Public

1. Monitoring student usage of academic support services
2. Development of faculty skills in instruction
3. Institution-wide emphasis on the teaching of undergraduates and undergraduate learning
4. Tracking persistence and progression patterns, term by term, for all students who matriculate
5. Identifying courses that are more difficult or less difficult to complete

## 2-year

1. Identifying courses with high withdrawal and/or failure rates
2. Setting measurable goals to improve the retention rate from term-to-term or year-to-year
3. Setting measurable goals for college completion rates
4. Title III or Title V funding
5. Tracking retention rates for specific academic programs

# Percentage of First-Year Students Who Return for a Second Year: 2006-2020 Selected Cohorts



# Implications for Retention and Completion Imperative

- ✓ Are you benchmarking against your peer set to help inform realistic goals/KPIs?
- ✓ Have you determined ROI on retention and completion efforts? (When tracked, RNL generally sees higher than marketing and recruitment ROI).
- ✓ Have you determined who on campus is accountable for retention and persistence plans and KPIs?





# **Market Perception/ Brand Position**

**4**

# The Student-First Landscape



**Today's students seek personalized experiences**



**Generation Z values authenticity and purpose**



**Importance of showing (not telling) student life**



**Need to communicate genuine institutional values**



**Power of student voices in brand storytelling**

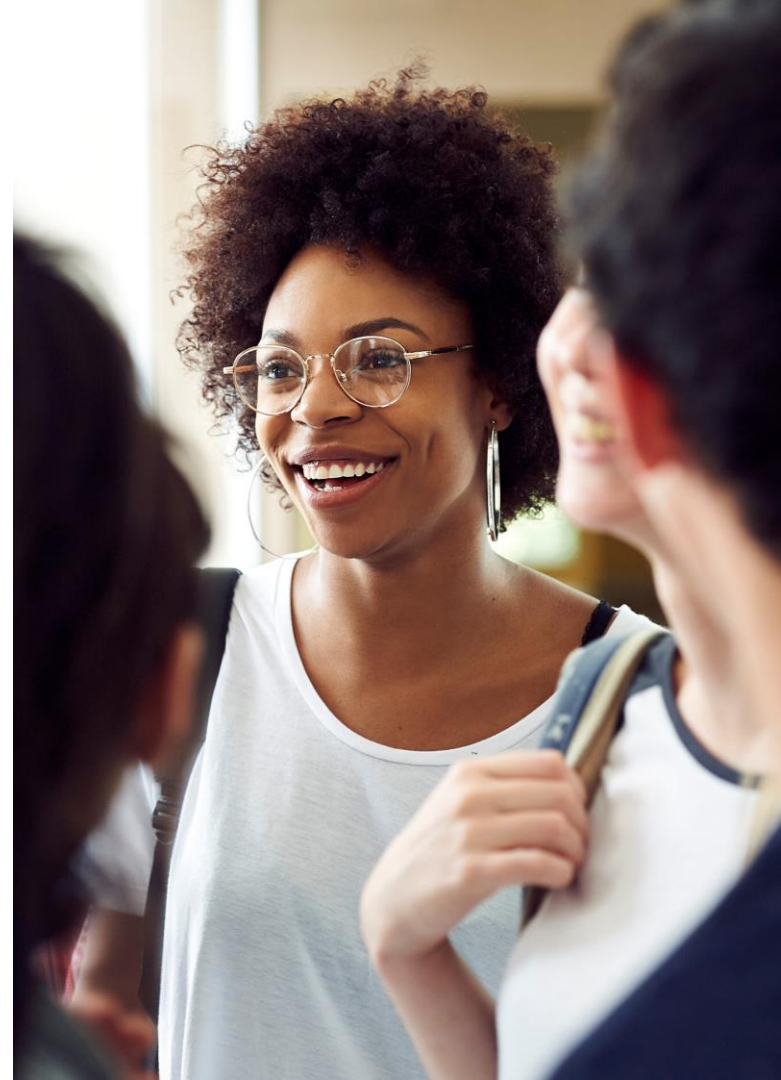


# Market Perception/Brand Position

**Value Scrutiny:** Students, parents, and employers increasingly question the value of a degree.

**Rising Costs:** Increasing tuition and student debt lead to concerns about return on investment.

**Alternative Education:** Competition from online certifications, bootcamps, and employer-sponsored training programs.



# Market Perception/Brand Position

## **Market Differentiation:**

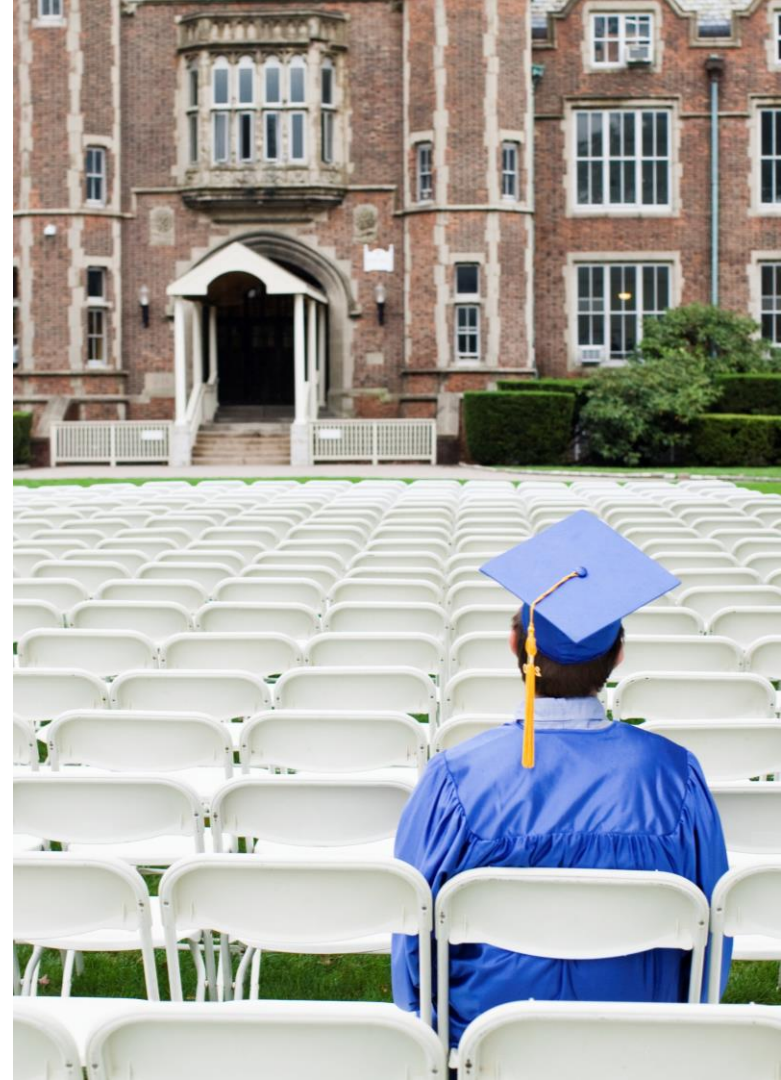
Institutions must stand out in a crowded and competitive landscape.

## **Balancing Act:**

Need to maintain academic excellence while focusing on career outcomes.

## **Reputation Risks:**

Negative media coverage, declining rankings, or controversies can impact enrollment.



# Implications for Market Perceptions/Brand Position



Are you clearly communicating your unique value proposition?



Are you showcasing student success stories?



How well are you building partnerships with area business?



Are you investing in digital marketing?



How well are you reinforcing to your external marketplace that you're staying relevant in a changing educational environment?



# **Technology and Infrastructure**

**5**

# Technology and Infrastructure

1

## **Aging Systems:**

Many institutions struggle with outdated technology infrastructure.

2

## **Limited IT Budgets:**

Financial constraints hinder necessary upgrades and improvements.

3

## **Cybersecurity Demands:**

Continuous enhancements are needed to protect against evolving threats.

# Technology and Infrastructure

## **Hybrid and Online Learning:**

Increased need for reliable digital platforms and high-speed internet.

## **Data Security:**

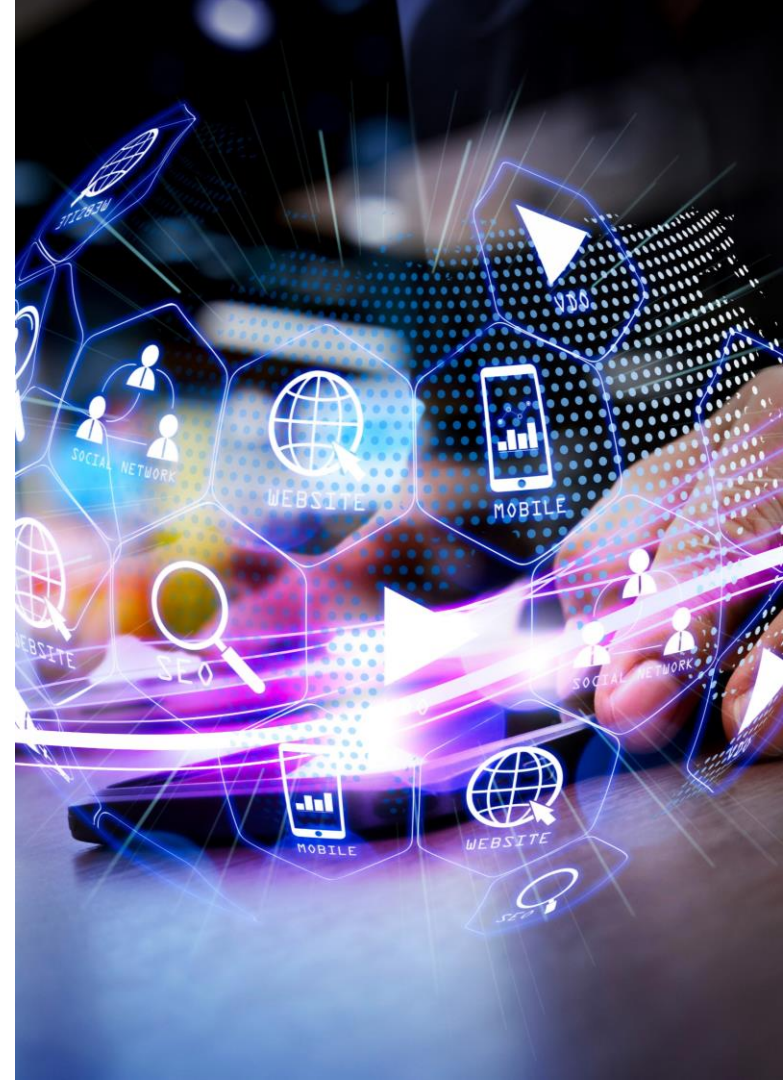
Growing importance of protecting student and faculty information.

## **Emerging Technologies:**

Integration of AI, cloud computing, and data analytics requires significant investment and expertise.

# Implications for Technology and Infrastructure

- **User expectations:**
  - Students and faculty expect seamless, tech-enhanced learning experiences.
- **Priorities for Institutions:**
  - IT modernization
  - Cybersecurity resilience
  - Digital accessibility





# **Campus Hiring and Employee Retention**

**6**



# Campus Hiring and Employee Retention

A challenge if not a crisis



Colleges and universities report experiencing 15-20% annual turnover in non-faculty positions annually



83% of supervisors report that it is somewhat or very challenging to fill vacant positions



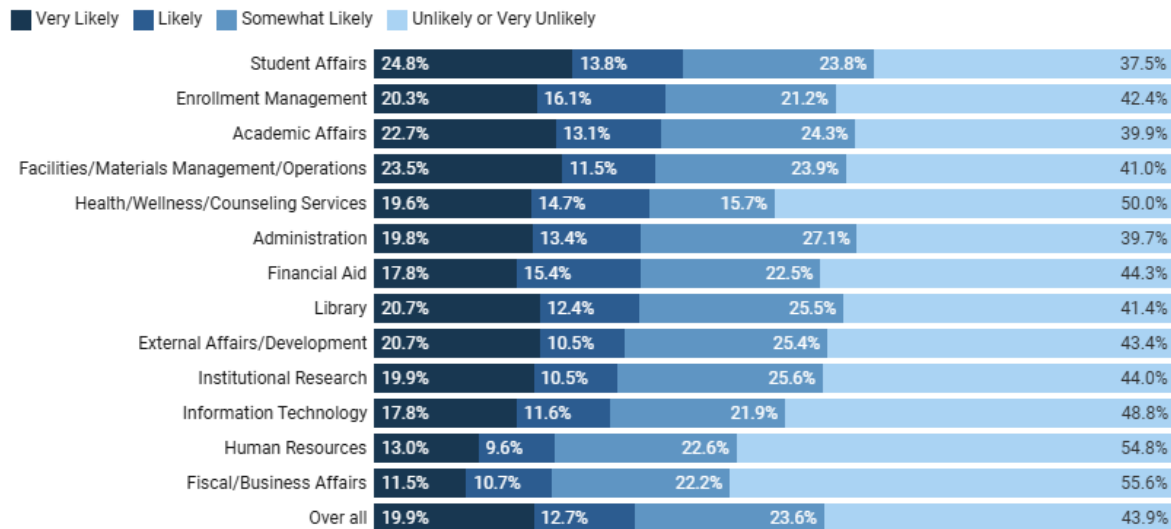
73% of supervisors report that it is somewhat or very challenging to retain staff

# Likelihood to Leave This Year

Nearly one-third are somewhat or very likely to look for a new job this year

## Seeking Other Employment

Almost a third of higher-ed employees said they were likely or very likely to look for a new job in the next year, with student-affairs staff members the most likely to do so.



Some totals may not sum to 100 percent because of rounding.

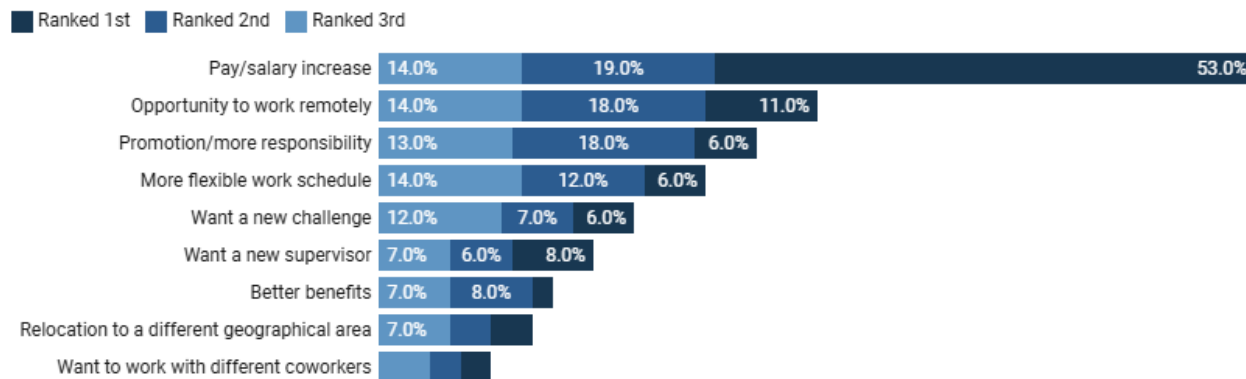
Source: [The CUPA-HR 2023 Higher Education Employee Retention Survey](#) • [Get the data](#) • Created with [Datawrapper](#)

# Reasons for Leaving

Pay is top driver followed by remote work, flexibility, and advancement opportunity

## Reasons for Leaving

Pay was overwhelmingly the top reason higher-ed staff members said they were looking for a new job, but the potential for remote work and career advancement also loomed large. This is how respondents ranked their top three motivators.



Source: [The CUPA-HR 2023 Higher Education Employee Retention Survey](#) • [Get the data](#) • Created with [Datawrapper](#)

# RNL College Employee Satisfaction Survey

## Most important campus culture and work environment items

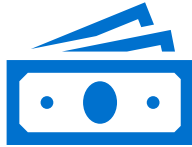
1. The institution treats **students** as its top priority.
2. The institution does a good job meeting the needs of **students.**
3. My **supervisor** pays attention to what I have to say.
4. I have the **information** I need to do my job well.
5. I am **paid** fairly for the work I do.
6. The institution promotes excellent employee-**student** relationships.
7. The **employee benefits** are valuable to me.
8. My department has the **staff needed** to do its job well.

# RNL College Employee Satisfaction Survey

Employees are least satisfied with the following areas of campus culture and their work environment

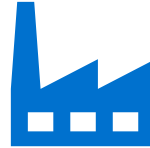
1. There are effective lines of **communication** between departments.
2. I am **paid** fairly for the work I do.
3. My department has the **staff needed** to do its job well.
4. Employee **suggestions** are used to improve our institution.
5. I have adequate opportunities for **advancement**.
6. My **department has the budget** needed to do its job well.
7. This institution makes **sufficient staff resources** available to achieve important objectives.
8. The institution involves employees in **planning** for the future.

# Campus Hiring and Employee Retention



## **Budget Constraints:**

Limited financial resources hinder hiring and retention efforts.



## **Competition for Talent:**

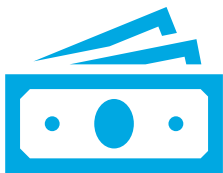
Increased competition for top candidates, especially in high-demand fields like STEM and healthcare.



## **Faculty and Staff Shortages:**

Recruitment challenges due to a lack of qualified professionals in key areas.

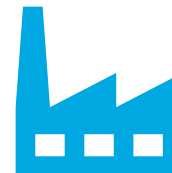
# Campus Hiring and Employee Retention



## Retention Issues

Difficulties keeping experienced educators and administrators due to:

- Stagnant wages
- Heavy workloads
- Burnout



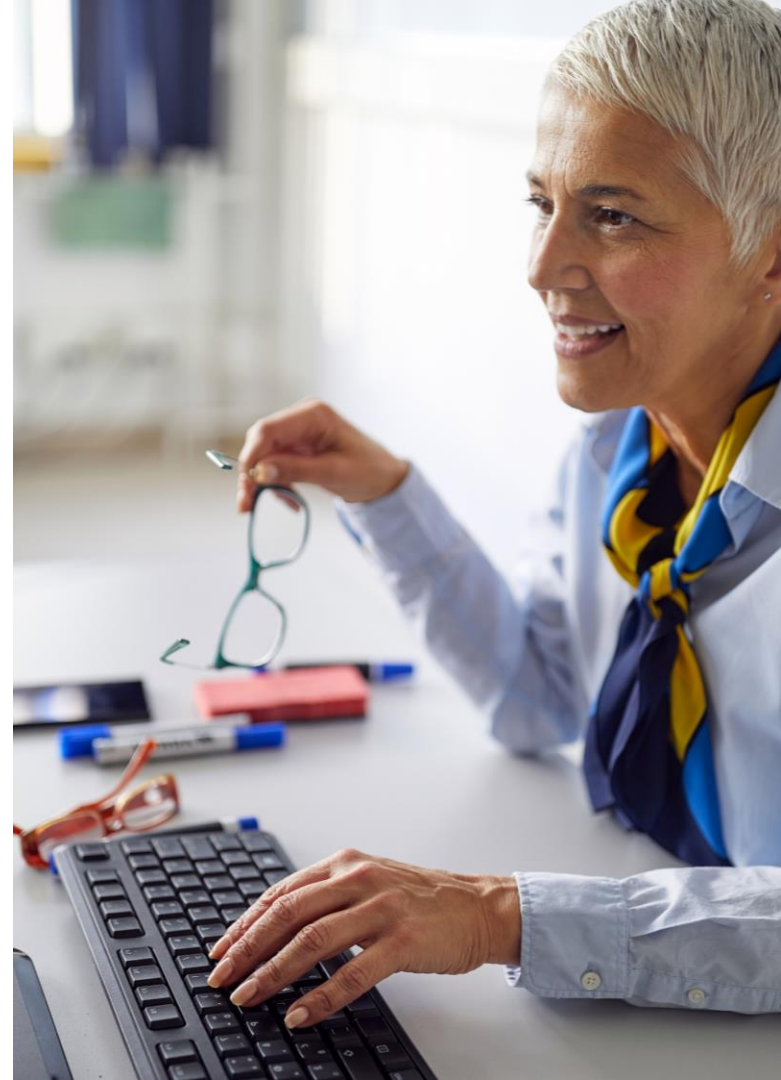
## Evolving Workplace Expectations

Younger faculty and staff prioritize:

- Flexible work arrangements
- Career development opportunities
- Diversity, equity, and inclusion (DEI) initiatives

# Implications for Campus Hiring and Employee Retention

- **Strategies for Talent Attraction and Retention:**
  - Offer competitive salaries and benefits.
  - Provide professional growth opportunities.
  - Promote work-life balance through flexible policies.







# **Policy/Regulatory Changes**



**7**

# Policy/Regulatory Changes

- **Policy and Regulatory Challenges:**

- Evolving federal and state policies on financial aid, student loan forgiveness, and Title IX regulations.
- Increased scrutiny over diversity, equity, and inclusion (DEI) initiatives.
- Legal and political challenges related to free speech policies.
- Regulatory updates on data privacy, cybersecurity, and international student policies.



# Policy/Regulatory Changes

---

## **Impact Areas:**

Funding and institutional operations.

Accreditation requirements.

Student access to education and financial aid.

Administrative processes and compliance efforts.

---

## **Institutional Priorities:**

Stay agile to adapt to regulatory changes.

Ensure compliance with evolving policies.

# Implications for Policy/Regulatory Changes

- **Advocate for policies that promote:**

- Student success.
- Financial sustainability.
- Academic freedom.

**Institutions must balance compliance with advocacy in an increasingly complex higher education environment.**





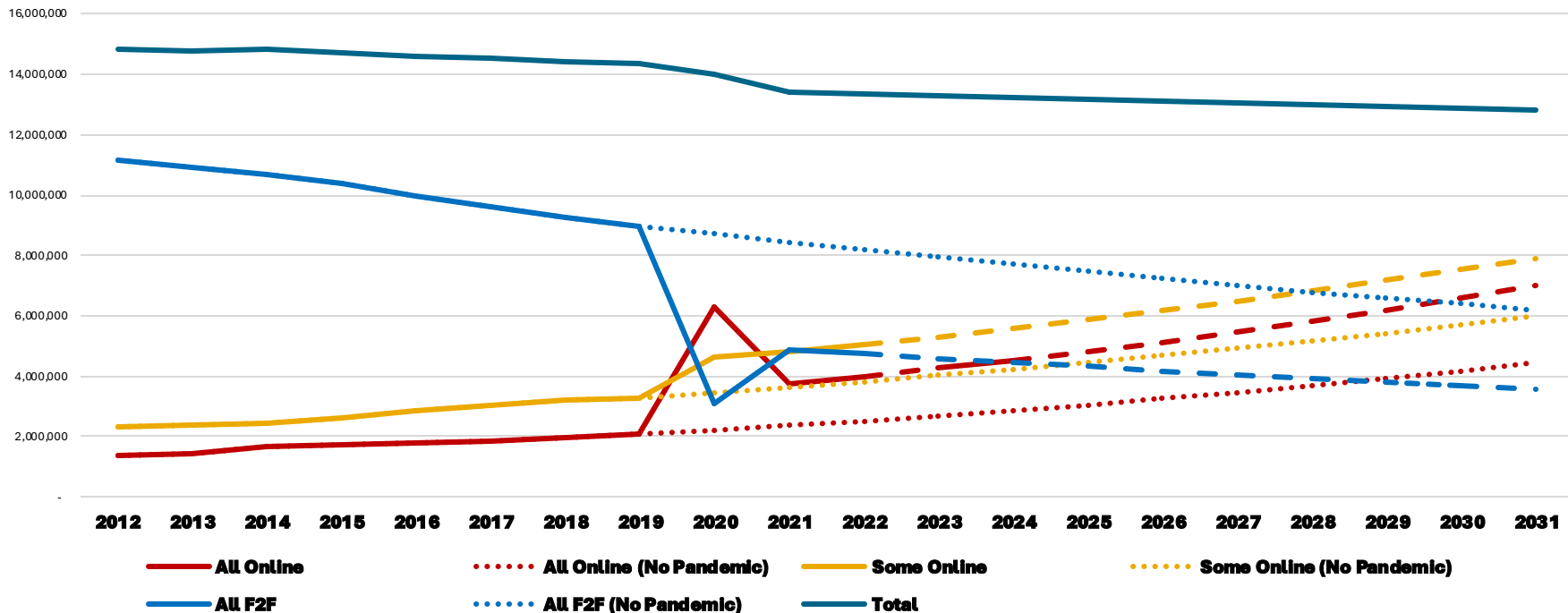
# **Program Adoption/Innovation and Restructuring**

**8**

# Undergraduate Enrollment Trends and Format Choice

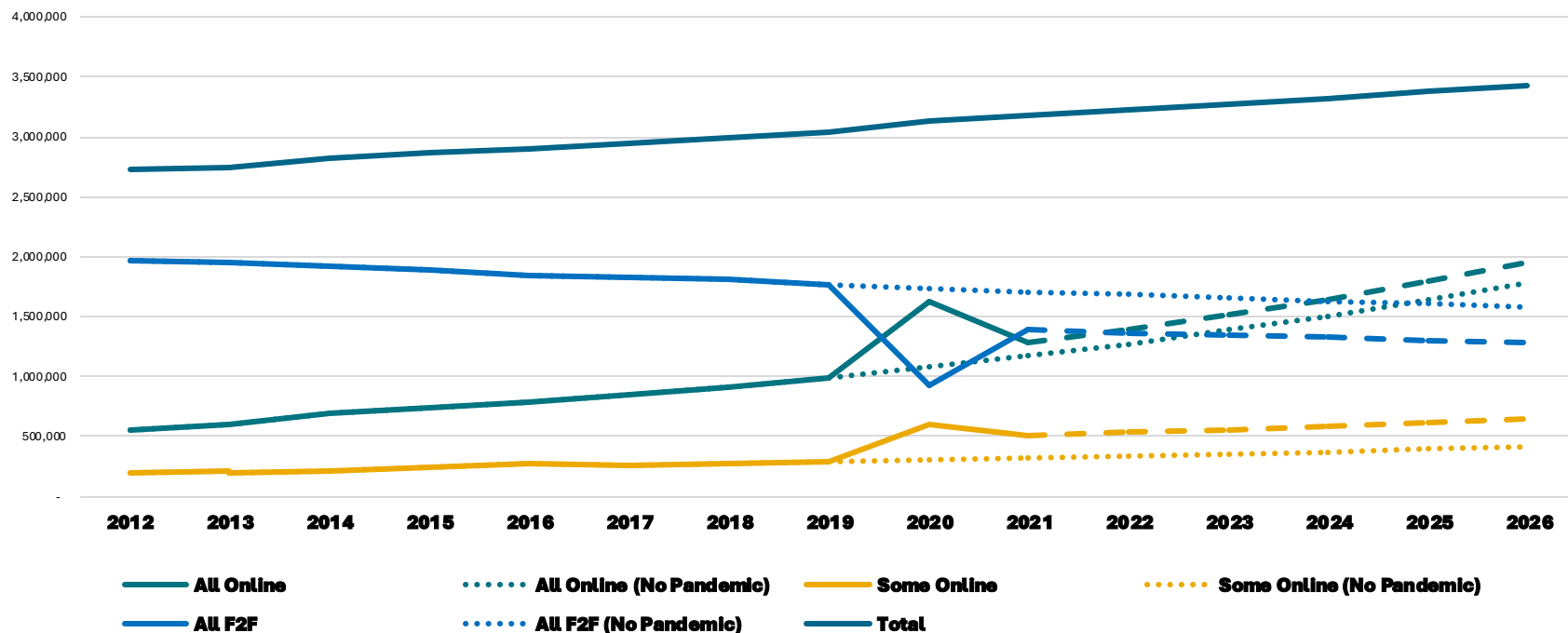
## (With and Without the Pandemic)

### Fall Enrollment: Undergraduate

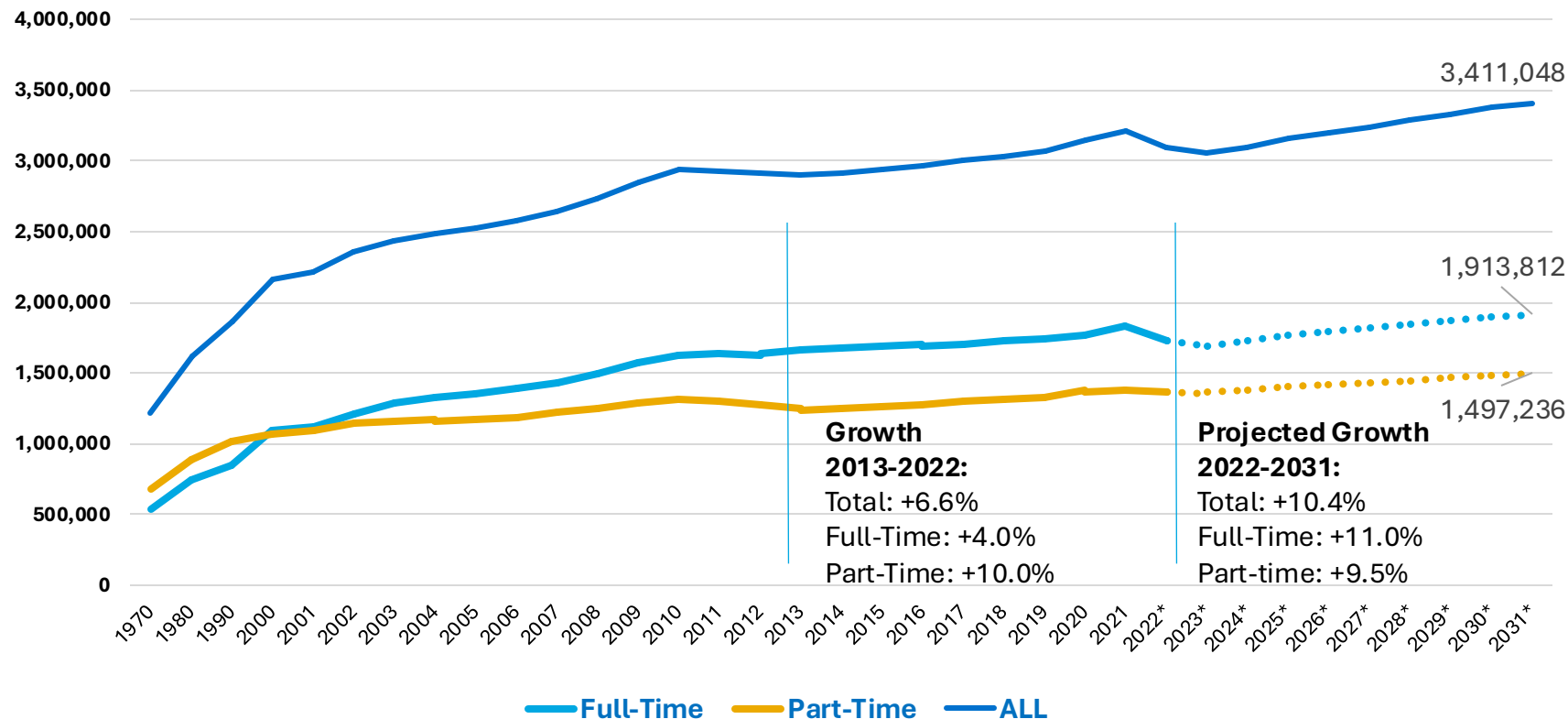


# Graduate Enrollment Trends and Format Choice (With and Without the Pandemic)

## Fall Enrollment: Graduate

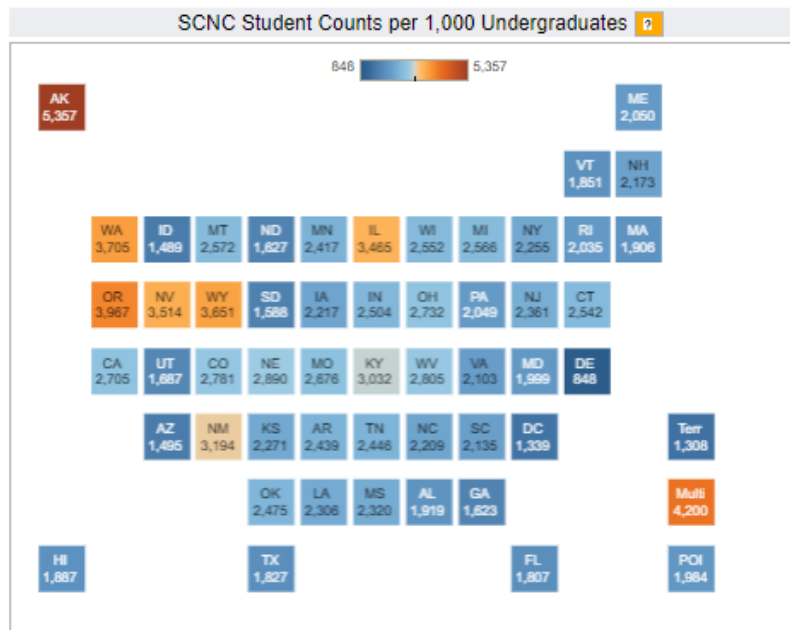


# Graduate Enrollment Projected to 2031 (by Enrollment Status)





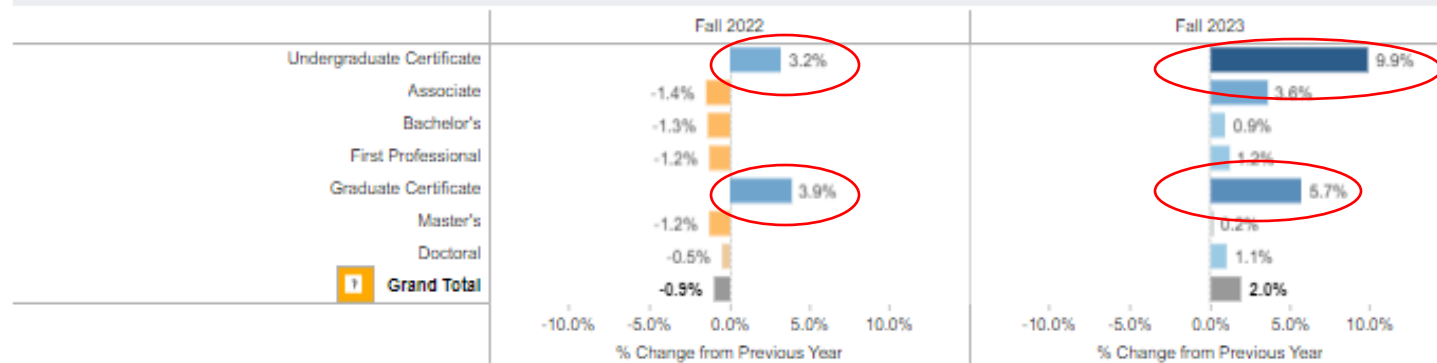
# 40.5 Million Students Nationally Have Some College, but No Credential



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

# Fall 2023: Undergraduate and Graduate Certificates Produced Significant Growth

Figure 1.1 Enrollment Changes by Credential Type



# Implications for Program Adoption/Innovation and Restructuring


- **Restructuring efforts:**

Driven by financial constraints, leading to:

- Program mergers.
- Faculty reassignments.
- Elimination of underperforming programs.

- **Institutional goals:**

- Foster critical thinking, adaptability, and lifelong learning in students.
- Continuously assess and evolve academic offerings to remain relevant and competitive.



# **Advancement and Fundraising**

9

# Donor Participation Has Been in Decline

Overall giving also fell since the pandemic

OVER THE LAST DECADE

**70%** of  
institutions  
experienced a  
**decline in donor  
counts**, with an  
**average loss  
of 30%**



EDUCATION GIVING DOWN

**3.6%**  
since the post-  
pandemic  
**record highs**



SINCE THE PANDEMIC

**80%** of  
institutions  
remain **down  
on donors**

# Without the Gown, We Have no Town



## Quantifying the Impact of College Closures

by NSC Blog | May 22, 2023 | Research Reports, Research Services |

2nd Report, "A Dream Derailed," Finds the Odds of Earning a Credential Cut in Half When Experiencing a Closure

EDUCATION

## Rural Residents Search for Solutions after Devastating College Closures

*As rural colleges in West Virginia, Iowa, and Maine shutter, the communities they leave behind struggle to reorient.*

Home // Radio // On Point



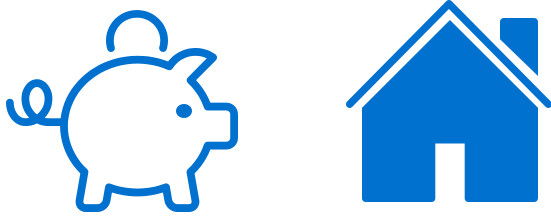
47:15

## What a decline in rural colleges means for rural communities

## 3 Ways Campus Closures Impact College Towns



# Financial Power of Millennial/Gen Z



**Millennial average net worth doubled during the pandemic.**

*Most is in real estate, making up one-third of wealth.*

## \$33 Trillion

Purchasing power of Gen Z

---

## 81%

Gave to a charity in 2021

---

## 55%

Say issues matter more than the organization



# Strategic Revenue Planning

- Aligns revenue streams around core priorities.
- Incorporates market feedback, financial trends, and campus needs into priority development.
- Diversifies funding sources and accommodates fluctuating market trends.
- Sets goals that are achievable given the financial environment, staffing, resources available.
- Creates transparency and reports on impact and growth.



# Implications for Advancement and Fundraising



## Changing Donor Preferences

Younger donors seek direct impact and transparency.

Preference for supporting specific initiatives over general endowments.



## Strategies for Effective Fundraising

Strengthen relationships with alumni.

Engage corporate and foundation partners.

Leverage digital and data-driven fundraising strategies.

Demonstrate clear value of donations.

Foster strong donor engagement.

Align fundraising efforts with institutional priorities.

# Top Questions, Objectives, and Conversations Coming From Boards and Leadership

- What should our institution's optimal enrollment should be?
- Will the investment in marketing/recruitment into new markets generate the enrollment growth we need—and if so, how long will that growth take?
- Where are the gaps in the student journey that hinder our campus from sustaining or improving retention/graduation rates? What is the cost to recruit a student vs. the cost to retain one?
- Does a strategic, flexible, and innovative road map exist to drive innovation and sustainable enrollment growth?
- Does the current market resonate with the institution's brand, academic program offerings, and the modality in which such programs are delivered?
- Which investments have the most promising ROI in both the short-term and long-term? How do we create the metrics to measure such ROI?

# Questions



# Thank you



**Wes Butterfield, PhD**

**Chief of Consulting Services**

**Wes.Butterfield@RuffaloNL.com**

**319.471.0232 mobile**

*All material in this presentation, including text and images, is the property of Ruffalo Noel Levitz. Permission is required to reproduce information.*



The 39th Annual National Higher Education Conference