

2019

TRENDS IN HIGHER EDUCATION

INTRODUCTION

The rate of change in higher education is accelerating, forcing institutions to rethink the way they operate. From the strategies enrollment teams use to retain international students to the introduction of virtual campus experiences and the addition of chief diversity officers, higher education institutions are evolving to meet their students' needs and the world's expectations. Institutions globally face these challenges; those that cannot adapt face mergers, acquisition, or even closure if they cannot remain viable.

The **TRENDS IN HIGHER EDUCATION: 2019** report unpacks the issues challenging higher education institutions and provides strategies for how they can adapt and evolve. While the challenges at hand are new, fast-changing, and complex, they are not insurmountable. With careful analysis and thoughtful strategies, higher education institutions can make the changes they need to ensure they not only survive, but thrive.



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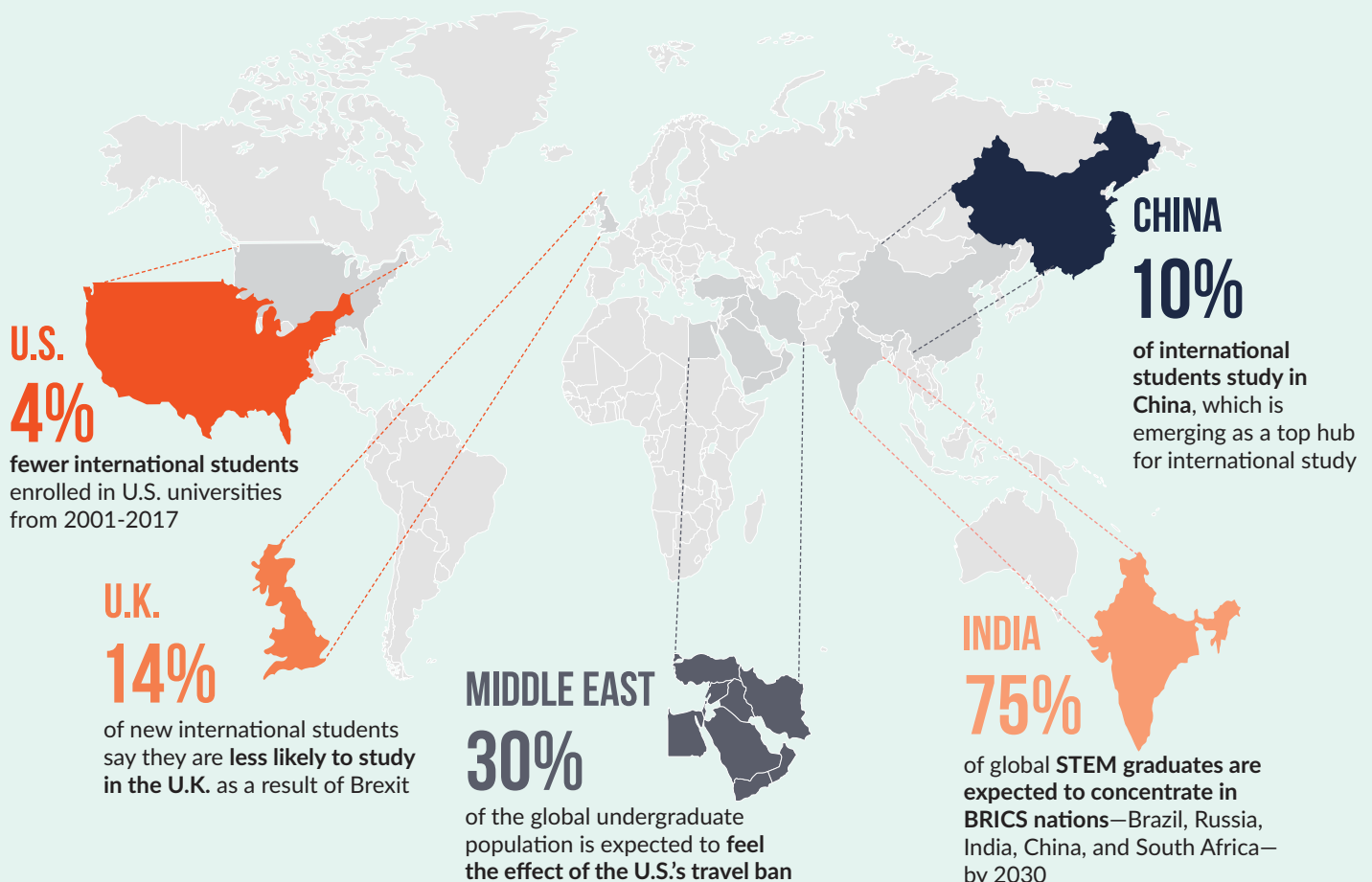
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INTERNATIONAL ENROLLMENTS DECLINE AMID POLITICAL UNCERTAINTY

The United States has historically been the leading destination for international students to study—international enrollment tops one million students at U.S. colleges and educational training programs and supplies \$39 billion in revenue. After a decade of explosive growth in international student enrollment, the trend began to flatten in 2016 and is expected to decline further in 2019 due to national and global influences. The travel ban, increased global competition, and policies affecting government funding and visas for work and study have led to students seeking education elsewhere. As international enrollment in the U.S. declines, students are instead considering emerging higher education hubs like China and South Africa to take advantage of easier visa processes and investments in better educational resources.



TIPS TO RETAIN INTERNATIONAL STUDENTS



ADDRESS international student concerns over stricter immigration policies.

- Provide counseling, open forums, and campus meetings to allow students to voice their concerns
- Utilize informational emails to provide up-to-date information on any changes to immigration policy

PROMOTE inclusivity in your messaging to international students.



- Emphasize inclusivity in your outreach efforts, such as with the #YouAreWelcomeHere social media and email campaigns
- Share efforts to support internationalization by profiling individual efforts on campus and in the community

PROVIDE career assistance for graduates.



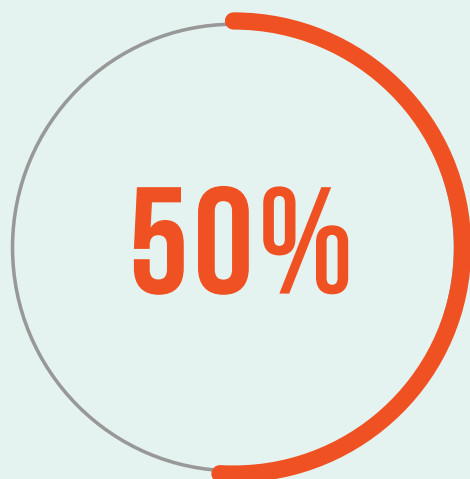
- Address post-graduation job insecurity by offering job-search portals that display companies seeking to hire graduates with alternative citizenships
- Provide networking opportunities with alumni who can help connect international students with prospective employers

WHAT DO INTERNATIONAL ENROLLMENT CHALLENGES LOOK LIKE IN 2019?

- 1. Stricter U.S. Immigration Policies:** The U.S.'s travel ban on seven countries—Iran, Libya, North Korea, Somalia, Syria, Venezuela, and Yemen—is expected to affect a notable amount of students, including first- and second-generation immigrant students who may experience restrictions on returning to their home countries. With significant declines in F-1 student and short-term visas, more students are seeking out countries like Canada, the U.K., and Australia that provide an easier visa process, allowing them to secure their study and visit their home countries with fewer restrictions.
- 2. Uncertain Political Climate:** The current U.S. political climate has cast a cloud over international enrollment: 81% of current international students express concern over recent political developments, with one-third of over 2,000 students surveyed citing a decreased interest in U.S. study in light of the political climate. Many prospective students fear the narrative that the U.S. is anti-immigrant and anti-global engagement, citing alarm over news headlines about violence and bias incidents at U.S. institutions.
- 3. Fewer Work Opportunities:** Following an executive order from the Trump administration to “hire American,” the process for acquiring an H-1B visa—allowing graduates to work for up to six years in the U.S.—has lengthened. In addition, less than one-fourth of employers plan to hire international students; many companies do not want to take a chance on sponsoring a visa for a graduate whose employment may end prematurely if they are deported.
- 4. Emerging Higher Education Hubs:** While the U.S. has historically been the top recruiter of international students, Europe, Asia, and developing countries are seeing an increase in their international enrollment rates. China's international student population, now the third highest in the world, has grown more than tenfold since 1995 due to the country's sizable number of top-ranked universities, low cost of living, and availability of scholarships. With lower-middle-income countries surpassing high-income countries in enrollments, developing nations are becoming a growing presence in the global higher education market.
- 5. Effects from Brexit:** The current British government's decision to leave the European Union in March 2019 has prompted many E.U. students to worry they will have to pay full international fees and may experience immigration difficulties. Many E.U. students remain skeptical that they will be eligible for student loans and tuition fees at the same rate as domestic students and worry they will have to undergo stringent checks on academic ability and English language skills. In addition, British students wishing to study in Europe fear limited access and potentially higher fees due to Brexit.

JOB-CRITICAL PROGRAMS BRIDGE THE COLLEGE-CAREER GAP

While unemployment has dropped below 4% for the first time since 2000, employment opportunities for recent college graduates (those who graduated within the last five years) have decreased by 0.1% since 2017. As grads struggle to find jobs that maximize their abilities, employers face a “skills gap,” reporting that only half of new recruits meet the skills needed for their roles. To help close the skills gap and improve the employment outcomes for graduates, many higher education institutions are providing more offerings to improve their graduates’ marketability, like job-critical certifications, core academic offerings embedded with hard skills like computer programming and mathematics, and opportunities to develop soft skills, like problem solving and organization.



New recruits who meet the skills needed for their roles, according to employers

89.4%



New graduates who consider themselves proficient in professionalism and work ethic

42.5%



Employers who agreed that new hires were proficient in professionalism and work ethic

WHAT EMPLOYERS LOOK FOR IN NEW HIRES

- ✓ Completed an internship with the organization
- ✓ Attractive major related to position
- ✓ Internship experience in the industry
- ✓ Leadership experience

0.1% 

Decrease in unemployment for recent college graduates since 2017, a rate that falls behind the rates of other experienced worker groups

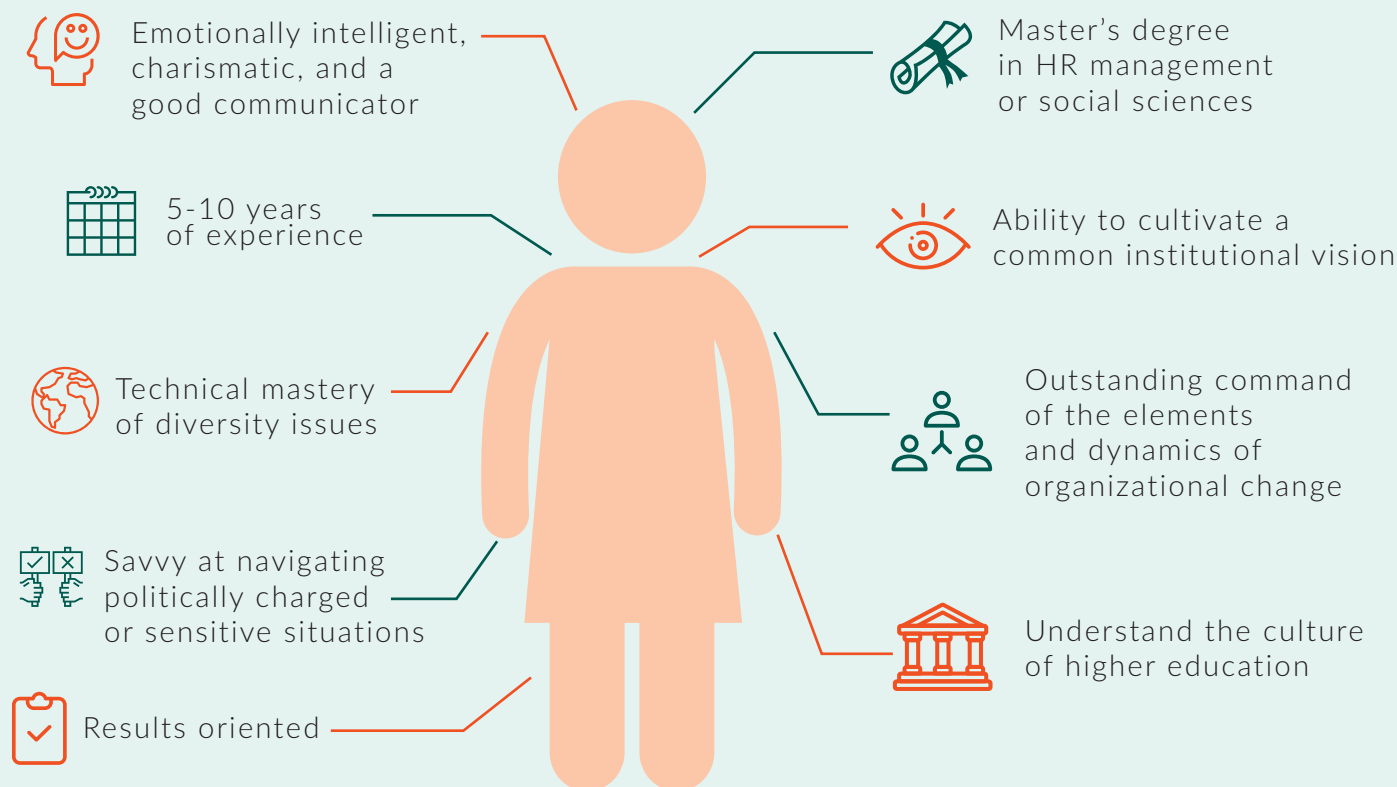
HOW WILL INSTITUTIONS ADDRESS THE COLLEGE-CAREER GAP IN 2019?

- 1. Offer Job-Critical Certifications:** As more jobs require college-based training, many previous students are returning to college to earn credentials throughout their careers, with a third of certificates earned by students over the age of 30. Institutions take their most in-demand academic programs into account when determining certificates to offer, while also considering how job-specific certificates could bolster the demand for less-popular majors. By surveying current and potential students, institutions can gain an understanding of students' educational priorities and can offer certificates that will best help them prepare for their future careers.
- 2. Invest in Career and Technical Programs:** Career and technical education (CTE) programs are designed to prepare students for their future careers, often with hands-on vocational training. Many institutions are investing in high-quality CTE programs that can improve student engagement, graduation rates, and postsecondary earning potential. While considering CTE programs, institutions should analyze employment projections and conduct wage analyses to determine which programs would help graduates secure jobs in the fields.
- 3. Embed Academic Offerings with Hard Skills:** Many graduates experience a skills gap between what they learned in college and the technical skills they need to succeed in their careers. To bridge the technical skills gap, institutions are offering instruction and learning experiences so students can harness hard skills in Excel, sales, computer networking, and more. In addition, institutions are offering field training to provide graduates with valuable hands-on experience to prepare them for their future careers. By instilling hard skills training in core academic offerings, institutions help students learn critical skills necessary to succeed in both technical fields and jobs centered on liberal arts, which increasingly require technical proficiency.
- 4. Provide Opportunities to Develop Soft Skills:** While developing hard skills is essential for students competing in the job market, employers are even more united in the opinion that recent graduates lack necessary soft skills. To bridge the gap, institutions increasingly offer a strong focus on soft skills to help students adapt to changing circumstances, learn through experience, work with others, and grow as leaders. Colleges are emphasizing soft skills like communication, customer service, and self-motivation in core academic offerings to help graduates succeed in their future roles.
- 5. Innovate Career Services:** With students graduating ill-equipped for the job market, some institutions are taking increasingly precise approaches to career services to translate the current needs of the market to faculty and students. Professionals from institutions' career centers work with hiring managers to determine the skills they look for in hires and the interviewing models they use to help students adequately prepare. In addition, institutions are establishing employer advisory boards that include corporate representatives that help institutions understand employers' needs while learning about their companies and trends in recruiting.

CHIEF DIVERSITY OFFICERS MEET THE DEMAND FOR INCLUSIVITY

To meet the demand for more diverse and inclusive campuses, many higher education institutions are hiring chief diversity officers (CDOs). Not only are Gen Z students arriving to campus demanding expanded inclusivity, employers are increasingly requiring applicants to demonstrate their contributions to diversity in interviews and their work. CDOs lead a multitude of diversity, equity, and inclusion (DEI) efforts, including diversity training for faculty, multicultural events, affirmative action compliance evaluations, and multicultural and minority support opportunities.

CHIEF DIVERSITY OFFICER PROFILE



WHERE DO CHIEF DIVERSITY OFFICERS (CDOs) COME FROM?



Former **faculty members** with a diversity research agenda

Lawyers well-versed in affirmative action law



Student development specialists

Individuals from the **corporate sector**



90

U.S. colleges and universities that have hired chief diversity officers



8
Institutions that have a more diverse faculty population than their student population

2044

When traditionally underrepresented populations are expected to reach majority status

HOW WILL INSTITUTIONS ADDRESS DIVERSITY IN 2019?

1. Recruit a Diverse Student Body and Workforce:

To include the perspectives of students from different backgrounds, CDOs are tasked with making prospective students feel welcome on campus. CDOs are focused on adding inclusive language in their institutions' mission and recruiting materials to help assure minority students that they will be supported during their studies. In addition, CDOs are addressing the low number of diverse faculty by developing best practices for hiring and retaining more diverse talent.

2. Address Discrimination and Harassment:

CDOs are focused on eliminating the harassment and/or discrimination students and faculty may experience on campus. CDOs are asking the hard questions: To what extent are sexual harassment, racial discrimination, and other forms of abuse impacting the campus community? CDOs then work to demonstrate the institution's commitment to addressing these incidents and preventing future ones by establishing nondiscrimination policies, a clear complaint and investigation process, and initiatives to make students and faculty feel safe and supported.

3. Lead Staff Diversity and Inclusion Training:

CDOs demonstrate their institutions' commitment to inclusion by holding faculty diversity and inclusion training. CDOs train key individuals, like managers, on the basics of harassment and discrimination law; managers then train their subordinates on these policies. With a focus on implicit bias, these trainings help establish a diverse and inclusive culture that swiftly takes action on harassment and discrimination incidents. These trainings also offer opportunities for open conversations about inclusion.

4. Help Students Communicate Cultural Competency to Employers:

Employers increasingly require an understanding of diversity and multiculturalism from their new hires, making it vital for CDOs to help students navigate diversity questions in job interviews. CDOs talk with students about their understanding of diversity, helping to educate them further and communicate cultural competence in discussions with employers. CDOs guide student interviewees on how to communicate to employers their commitment to an inclusive workplace environment and provide examples of how they have demonstrated cultural competency.

5. Navigate Campus and Political Tensions:

CDOs may lead institutions' diversity efforts, but many meet resistance from presidents who are not willing to divest funds into diversity initiatives. In addition, diversity and inclusion can be difficult topics that faculty and executives do not want to discuss; many may see them as efforts to be "politically correct" or feel uncomfortable with the idea that implicit bias affects minority students. CDOs must navigate these tensions to welcome all conversations about diversity and determine how to receive executive signoff on their inclusion initiatives.

TIME TO MERGE? INSTITUTIONS COMBINE TO SURVIVE FINANCIAL INSTABILITY

From layoffs to closures, higher education institutions are struggling to stay financially stable. Only 44% of chief financial officers at four-year colleges are confident their college will be financially stable over the next ten years—down from 52% in 2017. So, how do higher education institutions survive declining enrollments and public uncertainty over the value of a college education? To address financial instability, institutions are pursuing various paths in an attempt to survive: merging institutions, acquiring smaller institutions, and providing support for non-traditional learners. Other institutions have chosen to explore new revenue streams such as alternative education models, which aim to attract and retain students who demand flexibility with online-only education, weekend workshops, and more.

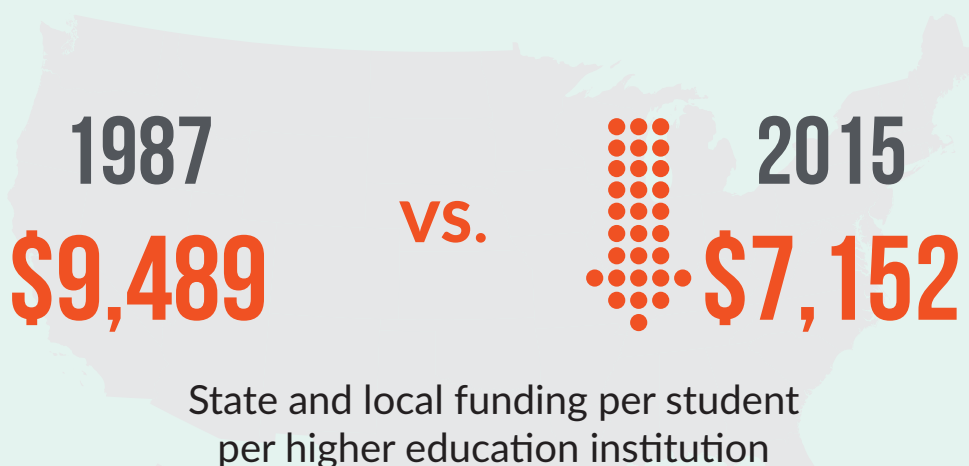


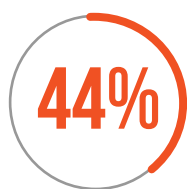
\$5.7 BILLION

Cut in federal funding for public higher education from 2008-2016

↑ 1.6% INCREASE

in state support for higher education from 2017 to 2018, its slowest growth in five years





Chief financial officers who feel confident that their higher education institutions will be financially stable over the next ten years



Fewer CFOs are optimistic about their higher education institutions' financial futures from 2017 to 2018



22

U.S. higher education institutions that merged or participated in acquisitions in 2017 compared to 12 in the 2000s

1 IN 8



Chief business officers who said senior administrators at their institutions had serious internal discussions about merging with another college or university in the last year

HOW WILL INSTITUTIONS ADDRESS FINANCIAL INSTABILITY IN 2019?

- 1. Pursue Mergers:** Some schools are merging together to help improve financial stability by becoming part of a larger organization. Mergers can be tricky to navigate; students and alumni may be resistant to change, while faculty and staff may fear losing their jobs. However, mergers have been shown to be a way to save at-risk colleges from a shutdown and preserve academic or recreational programs that might have otherwise been cut.
- 2. Acquire Small and Rural Institutions:** Smaller and rural public institutions face unique issues when it comes to financial instability: many rural institutions have been hard hit by students who are more willing to travel beyond home for college and may struggle to provide in-demand science and technology courses. In addition, many Midwestern research universities are being weakened by deep state budget cuts, threats to pensions and tenure, and reduced research funding. Some better-funded universities are taking advantage of this by acquiring small or rural institutions, offering them the protection of a brand name, financial security, and additional institutional resources. However, some small or rural institutions continue to resist acquisitions, fearing they will lose their independent voice by joining a larger organization.
- 3. Show Students the Value of Liberal Arts:** University officials are focused on proving the value of liberal arts in an age that prizes the sciences. Due to lower student enrollment, many institutions are cutting their liberal arts majors to expand finance, management, and marketing degrees, while others are dependent on outside contributions to survive. Liberal arts institutions and departments aim to win students back by adding "marketable skills" to their programs, plotting the job trajectories of graduates from its majors for prospective students, and providing post-graduation career support.
- 4. Offer Alternative Education Models:** To keep up with student demand for flexible, innovative learning models, many institutions are incorporating alternative approaches to the traditional classroom setting. Institutions are partnering with online platforms like Udemy and Coursera to offer certificate programs, with coding bootcamps also emerging to provide vocational training. When successful, these models can attract students, ease skepticism over the value of a degree, and can give graduates a leg up in the job market.
- 5. Attract Non-Traditional Learners:** Colleges are increasingly trying to attract students who are older, working, and/or have a family to ease their low enrollment numbers, requiring institutions to adjust their traditional offers to attract these learners. Institutions are incorporating more online education and weekend workshops to attract learners whose schedules may prevent full-time, on-campus studies. Institutions are also offering degree completion and career pathway programs, and increasingly accept more non-traditional credits toward degrees, like prior learning credits.

SMART TARGETING DRIVES DONOR GIVING

While giving to higher education institutions set a new high of \$43.6 million in 2017, changes to the tax law have led experts to anticipate a potential 4% decline in alumni giving in 2019. This reduction may be exacerbated as the number of alumni making donations has declined. With an unclear donor outlook, many institutions have focused their advancement departments on rebuilding their donor bases to identify more motivated, consistent donors. Institutions are expanding their efforts to reach these donors through smart targeting—personalizing requests for donations based on factors like individual givers' ages, preferences, and demographics. Using these advanced analysis techniques, institutions are able to target the donors most likely to make substantial gifts. In addition, smart targeting helps institutions maintain current, up-to-date contact information on their alumni, making targeted and frequent outreach more effective. To most effectively target potential donors, marketing, advancement, finance, and alumni relations departments are working together to personalize communication frequency, methods, and messaging to individual givers' preferences.



Alumni relations organizations that are fully integrated with fundraising operations

CROSS-DEPARTMENTAL COLLABORATION TO DRIVE SMART TARGETING

MARKETING

- Track alumni social engagement by creating a social engagement score that is added to the donor database
- Study follower sentiment to identify the issues driving positive interest that are likely to garner donor support
- Personalize outgoing communication with frequency and interest area selections

ADVANCEMENT

- Invest in donor database audit, cleaning, and expansion of donor details, including social activity and engagement
- Segment the donor list and create donor personas to assist in personalized donor outreach
- Coordinate giving campaigns with marketing and alumni relations outreach

FINANCE

- Model fundraising targets and scenarios
- Identify fundraising goals and connect how donor funds underwrite institutional expenses

ALUMNI RELATIONS

- Survey alumni for institutional feedback and to understand their likelihood to give
- Coordinate alumni engagement efforts with fundraising outreach
- Leverage marketing channels to better connect and unpack potential issues in alumni engagement



26.1%

Total funding support provided by alumni giving

FACTORS THAT INFLUENCE ALUMNI GIVING



Age



Employment



Communication preferences



Past giving to university



Previous involvement in university fundraising initiatives



Political contributions



Nonprofit giving and involvement



Real estate and stock ownership



Business affiliations for matching gift programs

HOW WILL INSTITUTIONS IMPLEMENT SMART TARGETING IN 2019?

1. Clean and Standardize Alumni Information:

Institutions are increasingly working to clean and update their alumni data while standardizing their alumni databases across departments. Young alumni may move or change jobs frequently, making it vital to keep databases up-to-date to correctly target donors. In addition, colleges are paying attention to alumni engagement patterns, marking specific activity in their databases to identify opportunities for smart targeting in the future.

2. Leverage Alumni Survey Data:

To update their alumni databases and identify opportunities for personalized messaging, many institutions are leveraging their alumni surveys to better understand potential donors. Institutions are using these surveys to ask alumni about their preferences for communication frequency, types of messaging, and donation methods. In addition, surveys provide a way for institutions to collect information on alumni to keep an up-to-date database of potential donor information, which helps institutions identify ways to personalize their communications.

3. Develop Donor Personas:

After studying alumni information, many institutions develop donor personas based on similar attributes between alumni. These fictional representations help marketers understand alumni's communication preferences and giving behaviors, informing the larger image of what donors prioritize and prefer. Institutions can then craft content specifically targeted to that audience and update their personas based on how alumni engage with the messaging.

4. Work Across Departments:

Working across departments, specifically advancement, marketing, and finance, helps institutions best determine how to attract alumni donations. Data sharing between departments brings different perspectives to the table: advancement crafts donor personas to inform alumni preferences, alumni relations leads the charge on alumni engagement, marketing provides communication support and guidance, and finance can identify how much to request from different types of givers. By maintaining a standardized alumni database across the institution, these departments inform alumni smart targeting to attract more givers.

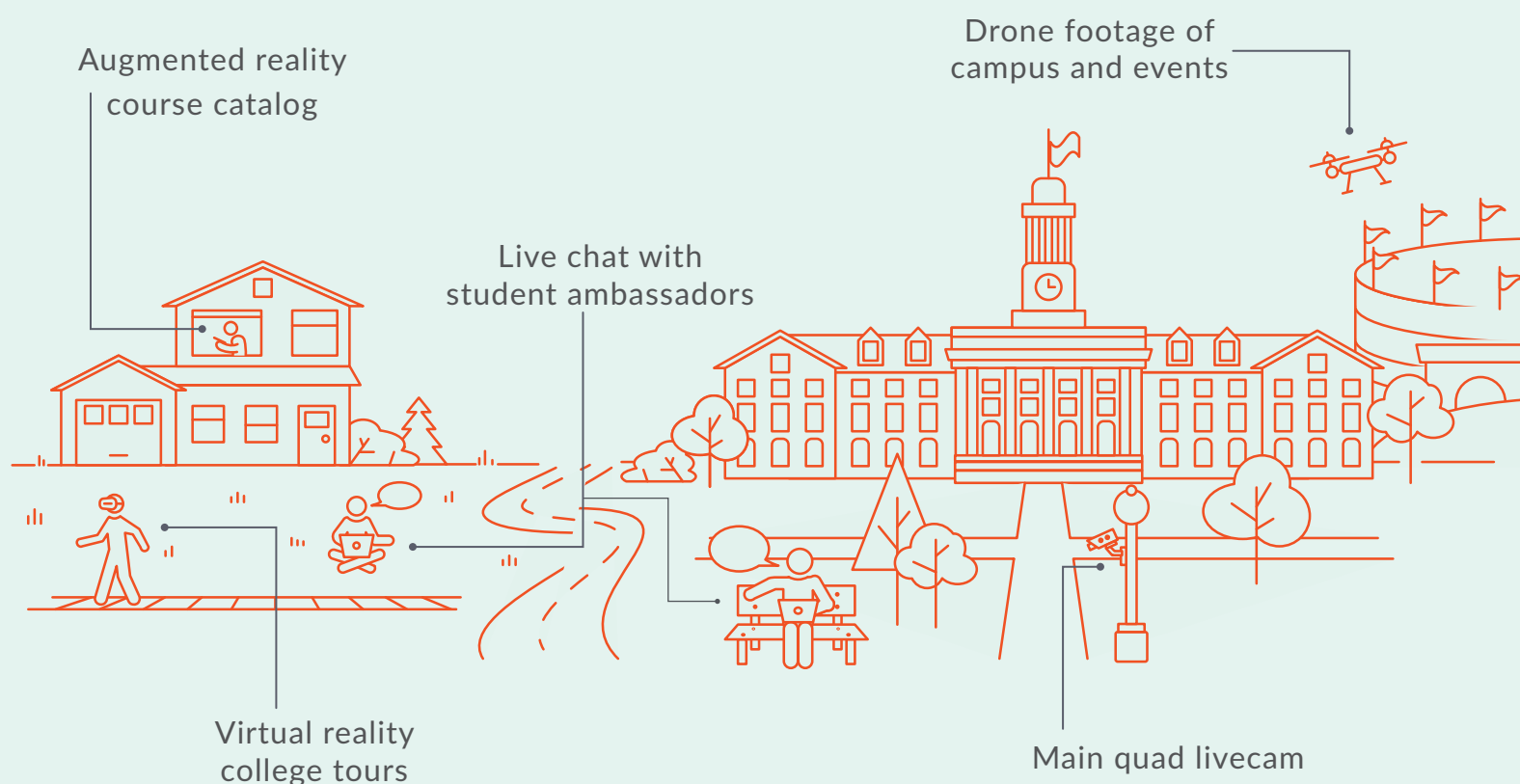
5. Implement Alternative Donation Methods:

Alumni may be more inclined to give if offered different ways to donate to their institutions. While most institutions have a giving page on their websites, others are implementing non-traditional donation methods, like text-to-give and autopayment systems to make giving easier and more accessible. In addition, some institutions are hosting Giving Days, one-day events that are heavily marketed to inspire alumni pride in their alma maters; these days of giving often provide many of the year's donations for institutions.

VIRTUAL RECRUITMENT TRANSFORMS THE PROSPECTIVE STUDENT EXPERIENCE

As tech-savvy Generation Z students enter higher education, institutions are pivoting to innovative marketing strategies to attract prospective students. Specifically, many institutions are exploring virtual reality (VR) and drones in order to give prospects a real-world look into life on campus. As Gen Z students have demonstrated their interest in VR, institutions have incorporated this technology to make their recruitment efforts more effective. By replacing videos of campus with immersive VR experiences, students can participate in campus tours and student events instead of staring at a static screen, allowing institutions to build more personal and unique brand stories. Drones are also being incorporated into digital marketing, capturing unique footage of sporting and student events as well as key campus buildings and features for promotional videos. There is no better boost for a brand than real-life experience; these technologies can provide those experiences to prospective students even before they make the commitment to visit campus.

THE VIRTUAL CAMPUS EXPERIENCE





U.S. Gen Zers that are
interested in virtual reality



Increase in admissions to the
Savannah College of Art and
Design after introducing AR and
VR recruiting tools

HOW WILL MARKETERS ENHANCE THEIR VIRTUAL BRANDS IN 2019?

1. Incorporate Virtual Experiences on Websites:

When institutions provide virtual experiences on their websites, student applications increase substantially. After seeing Millennials struggle to secure jobs, Gen Z expects institutions to prove the value of their education. As institutions provide more virtual experiences on their websites, prospective students are able to experience campus life firsthand, taking self-guided campus tours, sitting in on courses, and attending events.

2. Add Augmented Reality:

In addition to virtual reality (VR), some institutions are innovating their recruiting materials with augmented reality (AR), which can provide enhanced digital resources for learning about institutions. One institution that has pursued AR is the Savannah College of Art and Design (SCAD), which enhanced its course catalog with AR videos and animations that play through a custom-built app, providing more than 100 visual media assets and 200 micro-interactions. Institutions that implement AR in their recruiting provide interactive content to prospective students that engages them longer and inspires excitement.

3. Innovate Campus Tours:

Standing out at recruiting events can be difficult. To address this, some colleges provide virtual reality (VR) experience booths or headsets that allow students to "tour" the campus. Recruiters report that VR experiences attract more prospective students who speak with them longer about their institutions. VR can also inspire students who have already been accepted to proceed to enrollment; SCAD encouraged this by sending potential students Google Cardboard headsets to remind them what it would be like to attend the institution, which boosted admissions considerably.

4. Experiment with New Tools:

Institutions have begun experimenting with innovative tools to provide a full experience of campus life. Main quad livecams show an instant look at what is happening on campus, while drone footage can put prospective students in the middle of campus events. Institutions are also innovating with ways to connect prospective students directly with current students, such as live online chats with student ambassadors. Prospective students can ask current students what campus life is really like, getting a realistic view of institutions which they may trust more than standard recruiting materials.

5. Nurture Prospects without Email:

Technology has expanded the possibilities of university outreach. While email has been the traditional form for recruitment, Gen Z students favor other forms of communication over email, such as texts, an interactive website, and social media content. Marketers are increasingly using targeted social media to reach students who may not have heard of their institutions, providing engaging information about their institutions while interacting directly with prospective students.

SOURCE LIST

ENROLLMENT MANAGEMENT

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ACADEMIC DEVELOPMENT

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STUDENT EXPERIENCE

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FINANCE

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ADVANCEMENT

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MARKETING

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ABOUT HANOVER RESEARCH

Hanover Research provides high-quality, custom research and analytics through a cost effective model that helps clients make informed decisions, identify and seize opportunities, and heighten their effectiveness.

HANOVER'S HIGHER EDUCATION SOLUTIONS

Hanover enables higher education institutions to offer a world-class educational experience and operate an efficient and sustainable institution. Hanover's Higher Education Solutions tackle the academic and administrative challenges facing every department at your institution—amplifying your individual efforts with our tried and tested suite of solutions. Our partners include higher education institutions of all varieties: from large to small, public and private, two-year, four-year, professional, graduate, and for-profit institutions.

ACADEMIC SOLUTIONS

- **Enrollment Management:**
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Strengthen your academic portfolio through market analysis of existing and potential new programs.
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Spot at-risk students early, identify the drivers of attrition, and pinpoint factors driving poor post-graduate outcomes.

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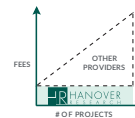
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