



## Notre Dame de Namur University Strategic Plan FY25-FY28

For over 170 years, NDNU built a reputation for educating the whole person, fostering in its students' concern about humanity, their communities, and personal well-being. Supported by strong academic programs, our students develop networks that not only serve them professionally but serve the Sisters of Notre Dame de Namur's Hallmark values that are at the core of their NDNU experience.

Since 2020, national enrollment trends in graduate education indicate declines in several disciplines, including those offered by NDNU. Enrollment for post-traditional, degree completion students has been in decline since 2018, but NDNU has shown growth in the past three years.

Opportunities for growth exist in expanding online offerings. A recent Ruffalo Noel Levitz (RNL) study of prospective graduate students shows that 39% of those surveyed prefer programs that are 100% online and 43% prefer hybrid modalities. (Refer to [Environmental Scan 2024](#))

Employer data indicates that we will continue to see challenges for teacher preparation programs, not because there are no jobs, but because there is a lack of interest in pursuing that career field due to current teaching conditions. Employer data for business and psychology is more promising.

A study of local competitors who are demonstrating success have three areas of focus:

- Doubling down on prior successes
- Going where there is market interest by expanding online offerings
- Demonstrating vision and gumption through bold and innovative leadership

NDNU's story is a turnaround story. To be successful, we must deliver programs in modalities that modern students want, make sure we have the right staff and faculty to build toward our future, and have adequate finances for investment.

Higher education leaders who have led successful turnarounds identify key lessons learned:

- Be realistic.
- Define health carefully.
- Identify the most critical KPIs and track them vigorously.
- Prepare for a long campaign at high speed.
- Have frequent access to the Board for swift decision making and support.
- Know the difference between late and too late.
- Leverage partnerships.
- Refocus on students.



## **Revised Notre Dame de Namur University Mission Statement**

To support the realignment of NDNU mission and purpose, we have revised the mission statement to reflect our institution's pivot to focus on adult learners seeking graduate and degree completion programs.

### **Notre Dame de Namur University Mission Statement**

Notre Dame de Namur University provides transformative, professionally oriented education designed for learners who reflect the diversity of our world. Our graduates are highly skilled professionals and lifelong learners who work to transform the world through values-based professional work and community-based action for social justice.

As an inclusive learning community, NDNU invites people from all walks of life to come together to honor the dignity, sacredness, and diversity of every person. Rooted in the inclusive values of the Sisters of Notre Dame de Namur, the Catholic intellectual tradition, and our liberal arts heritage, NDNU is guided by its Core Values and the Hallmarks of a Notre Dame de Namur Learning Community.

### **The Hallmarks of a Notre Dame de Namur Learning Community**

- We proclaim by our lives even more than by our words that God is good.
- We honor the dignity and sacredness of each person.
- We educate for and act on behalf of justice, peace, and care for all creation.
- We commit ourselves to community service.
- We embrace the gift of diversity.
- We create community among those with whom we work and with those we serve.
- We develop holistic learning communities which educate for life.

### **NDNU Core Values**

- Community
- Diversity
- Excellence
- Goodness
- Integrity
- Justice
- Learning
- Service

**How do we live our Mission?**

- Deliver accessible, innovative education that meets students where they are.
- Offer personalized and flexible programs that honor the whole person.
- Integrate innovative research-based teaching practices, core values, and experiential learning.
- Prepare students to be mindful users of technology and ethical global contributors.
- Promote the public good both locally and globally.
- Maintain a student-centered approach, reflecting our commitment to growth and success.

To support the development of a new 3-year NDNU Strategic Plan for the “post-traditional” student through graduate and undergraduate degree completion programs, the Cabinet engaged the NDNU Community to establish 4 work groups. These work groups included representatives from NDNU administration and academic leaders in the Schools of Education, Business & Management, and Psychology. The work groups took into consideration internal and external analysis regarding factors influencing and impacting the institution, including a SWOT (strengths, weaknesses, opportunities, and strengths) analysis to better inform NDNU’s new 3-Year Strategic Plan. ([Refer to SWOT Analysis](#))

The outcomes of these work groups resulted in the development of the five primary strategic goals and the associated [KPI metrics](#), which form the basis of the NDNU Strategic Plan for FY25-FY28:

- **Goal 1: Fiscal Sustainability**

Achieve fiscal sustainability through increased enrollments, diversified funding sources, aligning expenses with revenue, and enhanced operational efficiency, in accordance with WSCUC standards.

- **Goal 2: Build Market Recognition and Expand Brand Awareness**

Elevate our market presence and expand our brand awareness by highlighting the unique value of NDNU's diverse programs, exceptional faculty, and transformative student experiences.

- **Goal 3: Multimodal Educational Excellence**

Optimize a mix of professionally oriented academic programs that meet market demand. These programs will be offered in modalities that work for students. In any modality, programs will provide strong learning outcomes and an exceptional student experience.

- **Goal 4: Student Experience / Centeredness / Community**

Enhance and expand current services and resources to better anticipate and respond to student needs. These services and resources, including infrastructure, will support and empower student voices; offer meaningful feedback to strengthen curriculum and practices, and swiftly adapt to increased enrollment and new program offerings.

- **Goal 5: Establish New and Enhance Existing External Partnerships and Alumni Relations**  
Hire Director of University Partnerships. This would enable creating stronger advisory boards and increase knowledge of developing employer needs. Most importantly, it will create pipelines for student enrollment and opportunities for student teaching, clinical placements, internships, and OPT (Optional Practical Training) options.

## **Notre Dame de Namur University – Strategic Plan Goals and Strategies**

### **Goal 1: Fiscal Sustainability**

*Achieve fiscal sustainability through increased enrollments, diversified funding sources, aligning expenses with revenue, and enhanced operational efficiency, in accordance with WSCUC standards.*

#### **Strategy 1.1: Create a Strong Culture of Philanthropy**

Build a strong culture of philanthropy through personal engagement with alumni, donors, and friends through special events, a robust NDNU Annual Fund, major gifts, and grants program outreach. Position events, personal interactions, and direct communications as ways to cultivate donors and attract new supporters. Improve identification of donor prospects through data and reporting.

#### **Strategy 1.2: Boost Development Yield**

Identify NDNU short-term and long-term fundraising priorities and initiatives, including grant opportunities and cultivation of major gifts and donors. Create an Advancement Plan outlining the development goals and initiatives that NDNU will pursue, and the staffing needed for success. Hire staff and pursue the plan in coordination with other strategic efforts. Develop ongoing means for determining which funding needs will be prioritized.

#### **Strategy 1.3: Develop Enrollment Pipelines for Undergraduate Degree Completion and Graduate Degree Students**

Identify areas in which to build and expand community college articulation agreements and consortiums. Broaden reach with in-person and virtual early admission/instant admit events for graduate and degree completion students. Utilize technology to create connections between NDNU and prospective and admitted students resulting in lead generation. Establish better onboarding support services throughout the admissions process that will provide calls to action at each stage in the pipeline.

**Strategy 1.4: Build Employer Sponsor/Referral Partnership Framework to Increase Outreach and Enrollment Opportunities**

Establish deliberate guided pathways for students from underrepresented and traditionally underserved communities to receive bachelor's and master's degrees. Create branded relationships with community college partners, establishing ourselves as the second half of their path to attaining a bachelor's degree. Create employer sponsor and referral partnerships with non-profit and for-profit sectors to provide their clients and constituents with affordable degree completion, graduate, and credential options. These efforts will create an additional rotating pipeline of potential enrollments by using an integrated team advising approach. We will provide students with peer and alumni mentors and an array of student support services.

**Strategy 1.5: Build Annual Income from Endowment Corpus**

The CEO, CFO, the NDNU's Investment Firm, and the Institutional Investment Subcommittee will review, revise, and update NDNU's investment policy and portfolio and fully prepare the Board of Trustees with a recommended short-term and long-term investment strategy as the university prepares to invest its anticipated net proceeds from the future sale of the campus property. The investment strategy objective is to provide the university with ongoing income to help support its mission and students.

**Strategy 1.6: Implement the Tuition Revenue Projections from the Modernized Enrollment Planning Methodology**

Create, develop, and implement a predictive model to forecast future enrollment headcount and credit hour targets. Using year over year data and identifying percentage increases, tailor a plan that realistically predicts outcomes and future tuition revenue targets for budget development. This will allow the admissions team to strive toward a realistic goal and evaluate the different strategies that are being tested.

**Goal 2: Build Market Recognition and Expand Brand Awareness**

Elevate our market presence and expand our brand awareness by highlighting the unique value of NDNU's diverse programs, exceptional faculty, and transformative student experiences.

**Strategy 2.1: Continue to Build NDNU Brand Identity and Equity**

Given the significant changes to our core curriculum and value proposition as a university over the last 3 years, we will initiate strategies to focus branding on NDNU's graduate and degree completion programs, offering them in-person, hybrid, and fully on-line. Because the school programs are now more clearly defined through digital marketing and local community outreach, we will be shifting our focus to promote each University School's brand more holistically building our brand identity across the state of California and neighboring states.



### **Strategy 2.2: Website Redesign and Optimization**

The NDNU website is our first impression to student prospects and the community. After 10 years, we will be updating and modernizing the site to reflect NDNU's new brand identity and create an optimized environment to recruit students and donors and build stronger relationships with alumni. Through dynamic content, personalization and AI technology, the new website will be built to reflect NDNU's value proposition and effectively engage these key stakeholders.

### **Strategy 2.3: Enrollment Marketing and Advertising Campaigns**

We will continue to develop targeted recruitment campaigns for prospective students by creating campaigns for new students, transfer students, and international students, where applicable.

(Refer to FY25 – FY28 Enrollment Marketing Plan)

### **Strategy 2.4 Public Relations and Media Outreach:**

We will continue to implement effective public relations and media outreach for NDNU by setting clear, measurable goals to raise the institution's profile, engage key audiences and influencers, to promote a positive reputation of our institution's faculty, leadership, and alumni. We will continue to pitch stories about NDNU's academic achievements, programs, and community involvement. Our tactics will include continuous media outreach that promotes the university's programs, key milestones during our transition related to Stanford's potential purchase of the campus property, and faculty accomplishments, focusing on the university's unique selling points.

### **Goal 3: Multimodal Educational Excellence**

Optimize a mix of professionally oriented academic programs that meet market demand. These programs will be offered in modalities that work for students. In any modality, programs will provide strong learning outcomes and an exceptional student experience.

**Strategy 3.1: Program Mix Review**

Review data on program demand and modality to include programs to sunset in order to efficiently use resources.

**Strategy 3.2: Multimodal Excellence: Enhance Quality of Courses and Faculty Knowledge of Engaging and Equitable Practices for Diverse Learners**

Develop courses and programs in multiple modalities to meet student needs for flexibility. Create an incentive structure for faculty to engage in expansion of online learning and related professional development.

**Strategy 3.3: Build Practical and Ethical Use of Artificial Intelligence into All Programs.**

With strong faculty involvement, create a vision for NDNU's academic program mix that is mission-centric, coherent, aligned with NDNU's new direction, and leads to enrollment growth. Based on a SWOT analysis, plan parameters should include innovative programs and new populations to serve, evolution of academic program modality (in-person, hybrid, online) to meet adult student needs, and metrics to gauge program sustainability.

**Goal 4: Student Experience / Centeredness / Community**

Enhance and expand current services and resources to better anticipate and respond to student needs. These services and resources, including infrastructure, will support and empower student voices, offer meaningful feedback to strengthen curriculum and academic practices, and swiftly adapt to increased enrollment and new program offerings.

**Strategy: 4:1 Develop Hiring Needs Plan**

Including University stakeholders, assess, develop, and implement a staffing plan. Create a policy and procedure for new and replacement hires that align with the annual budget development timeline. Ensure that current and future job descriptions are reviewed and updated to reflect modern standards for use of technology in a multimodal working environment. Vacated positions and their functions should be assessed and determined if they should be reassigned to existing positions as potential reclassification before automatically determining replacement. Any high-priority vacated position should be replaced within three months or reallocated to other higher-priority positions.

**Strategy 4.2: Democratize online learning for all students by providing essential equipment, training, and support services.**

Assess, develop, and deploy standards for university facilities and information technology to support hybrid/remote work and Hyflex learning environments with both asynchronous and synchronous capabilities. Expand technical support coverage. With stakeholders, assess, develop, design, and implement a comprehensive policy and training program for staff and faculty to optimize the use of technology, AI, and working conditions in hybrid or fully remote environments.

**Strategy 4.3: Foster a culture among faculty and staff that embraces the values and practices of a modern university.**

Create a dynamic and forward-thinking culture among faculty and staff that aligns with the values and practices of a modern university. This includes fostering innovation, inclusivity, collaboration, academic excellence, community engagement, and lifelong learning. Establish and communicate the shared values and vision of the university that guide decision-making, behavior, and relationships within the institution while promoting an environment where faculty and staff collaborate across disciplines, share knowledge, and innovate together.

Encourage ongoing development and skill-building among faculty and staff to support their personal growth and adaptability in a rapidly changing academic landscape while building diverse, equitable, and inclusive campus culture that actively supports the well-being and success of all faculty, staff, and students.

Empower faculty and staff to use innovative technologies and data-driven practices in teaching, administration, and research while continuing to use high touch institutional communication to ensure that faculty and staff are well-informed, engaged, and able to contribute to decision-making processes.

**Goal 5: Establish New and Enhance Existing External Partnerships and Alumni Relations**

Hire Director of University Partnerships. This would enable creating stronger advisory boards and increase knowledge of developing employer needs. Most importantly, it will create pipelines for student enrollment and opportunities for student teaching, clinical placements, internships, and OPT (Optional Practical Training) options.

**Strategy 5.1: Create pipelines for student enrollment and opportunities for student teaching, clinical placements, internships, and OPT (Optional Practical Training) options.**

**Strategy 5.2: Build a database of alumni employment to support partnership initiatives. Use alumni outreach and advisory boards to refine programs and identify emerging trends.**

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NDNU administration is grateful to the many faculty, staff, students, and Board members involved in this plan, and we will continue to solicit input and guidance from our constituents.

## APPENDIX

# 2025-2028 NDNU Strategic Plan Key Performance Indicators

## GOAL ONE

	Implementation Strategy	KPI, Metric, Monitoring	Baseline Measure	FY25-26	FY26-27	FY27-28	Responsible Person & KPI Data Source
<b>Fiscal Sustainability - Achieve fiscal sustainability through increased enrollments, diversified funding sources, aligning expenses with revenue, and enhanced operational efficiency, in accordance with WSCUC standards.</b>	Seek more grants	Track revenue growth annually using financial reports and audits to ensure progress towards the X% target for each fiscal year.	Federal existing grants not considered NDNU was awarded two grants:  \$100,000 + \$20,000 <hr/> \$120,000	Federal grants not considered Goal = \$350,000	Federal grants not considered Goal = \$450,000	Federal grants not considered Goal = \$450,000	<b>Responsible Person:</b> Aric Agresti  <b>KPI Data Source:</b> Aric Agresti
	Seek more donations	Track donations online from donors and alumni	Baseline Goal = \$50,000 Actual = \$114,000	Goal = \$100,000	Goal = \$150,000	Goal = \$200,000	<b>Responsible Person:</b> Aric Agresti  <b>KPI Data Source:</b> Aric Agresti
	Build annual income from endowment corpus	Annual Income from Endowment Corpus	\$690K	\$759K (10%)	\$835K (10%)	\$919K (10%)	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> Aric Agresti, Mike Renzi
	Enhance CRM campaigns to manage nurture leads	Funnel Conversion Rates	All Student Admissions Funnel Stages	2.5% conversion rate	2.5% conversion rate	2.5% conversion rate	<b>Responsible Person:</b> Laurel Gardner, Tanya Tran  <b>KPI Data Source:</b> Maddie Reffel
	Build upon Employer Sponsor/Referral partnership framework to increase outreach and enrollment opportunities	Student conversion rates  Partnership MOU rates	3	2 enrollments per partnership  10 new partnerships year 1	2 enrollments per partnership  10 new partnerships year 2	2 enrollments per partnership  10 new partnerships year 3	<b>Responsible Person:</b> Tanya Tran  <b>KPI Data Source:</b> Maddie Reffel

## 2025-2028 NDNU Strategic Plan Key Performance Indicators

	International and Domestic Student Applicant Digital Orientation	Open Rate Conversion Rate	All Admitted Domestic Applicants  All International Applicants	85% enrollment rate  Based on Visa approval	85% enrollment rate  Based on Visa approval	85% enrollment rate  Based on Visa approval	<b>Responsible Person:</b> Tanya Tran  <b>KPI Data Source:</b> Maddie Reffel
	Personalized Email, Text and Call Blitz College Readiness Survey Campaigns	Click Rates Funnel Conversions	All Admissions Funnel stages	2.5% 3%	2.5% 3%	2.5% 3%	<b>Responsible Person:</b> Laurel Gardner  <b>KPI Data Source:</b> Maddie Reffel
	Lead Scoring System	Digital, Video, Voice and Event Engagement, Source, Intent Data, Opt Outs	All Student Admissions Funnel Stages	+10 per positive engagement- -10 per negative engagement	+10 per positive engagement- -10 per negative engagement	+10 per positive engagement- -10 per negative engagement	<b>Responsible Person:</b> Tanya Tran  <b>KPI Data Source:</b> Maddie Reffel
	Host on campus info sessions, Virtual Webinars, Recorded Info Sessions	Attendance Rates, Click Rates	All Appointments Scheduled, All recording campaigns	50% show rate 40% Schedule Rate	50% show rate 40% Schedule Rate	50% show rate 40% Schedule Rate	<b>Responsible Person:</b> Laurel Gardner, Ryan Espinoza  <b>KPI Data Source:</b> Maddie Reffel
	Increase Community College MOUs	Articulation Agreements, Consortium members, Assist.org membership	1 current MOU	3 new partnership MOUs per year  15 new enrollments per year (5 per MOU)	3 new partnership MOUs per year  15 new enrollments per year (5 per MOU)	3 new partnership MOUs per year  15 new enrollments per year (5 per MOU)	<b>Responsible Person:</b> Tanya Tran, Evelia Chacon, Erica Dominguez  <b>KPI Data Source:</b> Maddie Reffel, Tanya Tran
	Implement the tuition revenue projections from the	Credit Hours to Revenue Goals	FY 2025 Actuals and projections to newly	YoY% increase	YoY% increase	YoY% increase	<b>Responsible Person:</b> Tanya Tran Mike Renzi

## 2025-2028 NDNU Strategic Plan Key Performance Indicators

	modernized enrollment planning methodology.		adjusted expected revenue.				<b>KPI Data Source:</b> Chuck Walz
	Video Messaging (Admissions and Financial Aid)	Opens, Engagement Funnel Stage Conversions	All Lead Funnel Stages	2.5% open rate	2.5% open rate	2.5% open rate	<b>Responsible Person:</b> Tanya Tran, Laurel Gardner, Nick Spagnoli  <b>KPI Data Source:</b> Maddie Reffel
	Build and develop relationships with international recruiters	MOUs	3	4	5		<b>Responsible Person:</b> Tanya Tran <b>KPI Data Source:</b> Maddie Reffel, Tanya Tran
	Reduce time to admissions decisions	Application Completed to Admit/Denial conversion rates	5 days -3 weeks	3 days	3 days	3 days	<b>Responsible Person:</b> Laurel Gardner  <b>KPI Data Source:</b> Maddie Reffel

# 2025-2028 NDNU Strategic Plan Key Performance Indicators

## GOAL TWO

	Implementation Strategy	KPI, Metric, Monitoring	Baseline Measure	FY25-26	FY26-27	FY27-28	Responsible Person & KPI Data Source
<b><u>Build Market Recognition and Expand Brand Awareness - Elevate our market presence and expand our brand awareness by highlighting the unique value of NDNU's diverse programs, exceptional faculty, and transformative student experiences.</u></b>	Building Brand Identity and Equity	<b>Search Volume:</b> the number of times our university is searched within a given timeframe.  Social Media Post Shares	Search Volume: 304,290  Shares: 1,514	311,897 (+2.5%)  1,551 (+2.5%)	319,694 (+2.5%)  1,589 (+2.5%)	327,686 (+2.5%)  1,628 (+2.5%)	<b>Responsible Person:</b> Kurt Allen  <b>KPI Data Source:</b> Jason Cambra
	Website optimization	Website Unique Visitors  Average Time on the Website per Session  Average Page Views per Session  Reduce <b>Bounce Rates</b> (the percentage of visitors who leave the website after viewing only one page.)	122,000 Unique Visitors  56 seconds  1.6 Page Views Per Session  62% Bounce Rate	125,050 (+2.5%)  57.4 (+2.5%)  1.64 (+2.5%)  60.45% (-2.5%)	128,176 (+2.5%)  58.8 (+2.5%)  1.68 (+2.5%)  58.93 (-2.5%)	131,380 (+2.5%)  60.3 (+2.5%)  1.72 (+2.5%)  57.47% (-2.5%)	<b>Responsible Person:</b> Nick Spagnoli  <b>KPI Data Source:</b> Jason Cambra
	SEO and SEM (Strategic Enrollment Management)	<b>DR Score:</b> measures the strength of its link profile, reflecting links from other sites, on a scale from 0 to 100.  <b>Organic Search Visitors:</b> users who reach our website through unpaid search engine results.	DR Score: 58  Organic Sessions: 37,227	59.45 (+2.5%)  38,157 (+2.5%)	60.93 (+2.5%)  39,111 (+2.5%)	62.46 (+2.5%)  40,089 (+2.5%)	<b>Responsible Person:</b> Ryan Espinosa  <b>KPI Data Source:</b> Jason Cambra
	Maintain Paid Social Media Marketing Performance	<b>CTR:</b> Click Through Rate is the percentage of people who click on a link out of the total who view it.	Meta CTR: 3.26%	3.26% (Stable)	3.26% (Stable)	3.26% (Stable)	<b>Responsible Person:</b> Ryan Espinosa  <b>KPI Data Source:</b> Jason Cambra

## 2025-2028 NDNU Strategic Plan Key Performance Indicators

	Build online communities (Followers on our Social Channels)	Followers on Social Media Platforms	Facebook: 7,400  LinkedIn: 15,000  Instagram: 1,484  YouTube: 360  X/Twitter: 1,300	7,585 (+2.5%)  15,375 (+2.5%)  1,521 (+2.5%)  369 (+2.5%)  1,332 (+2.5%)	7,774 (+2.5%)  15,759 (+2.5%)  1,559 (+2.5%)  378 (+2.5%)  1,365 (+2.5%)	7,968 (+2.5%)  16,153 (+2.5%)  1,598 (+2.5%)  387 (+2.5%)  1,400 (+2.5%)	<b>Responsible Person:</b> Nick Spagnoli  <b>KPI Data Source:</b> Jason Cambra
	Targeted Recruitment Campaigns  Prospective Students: Develop campaigns targeting prospective students, transfer students, and international students	Total Inquiries, Qualified Leads & Application Starts from Paid Campaigns	7,226 Inquiries  394 Qualified Leads  108 Apps Starts	7,406 (+2.5%)  403 (+2.5%)  110 (+2.5%)	7,591 (+2.5%)  413 (+2.5%)  112 (+2.5%)	7,781 (+2.5%)  423 (+2.5%)  115 (+2.5%)	<b>Responsible Person:</b> Jason Cambra & Ryan Espinosa  <b>KPI Data Source:</b> Jason Cambra
	Public Relations and Media Outreach: Pitch stories about NDNU's achievements, programs, and community impact.	<b>Audience Reach:</b> The total number of unique people who see our content.  <b>Audience Views:</b> The total number of times our content is viewed, including repeats.	Ongoing	Executed	Executed	Executed	<b>Responsible Person:</b> Kurt Allen  <b>KPI Data Source:</b> Kurt Allen

# 2025-2028 NDNU Strategic Plan Key Performance Indicators

## GOAL THREE

	Implementation Strategy	KPI, Metric, Monitoring	Baseline Measure	FY25-26	FY26-28	FY27-28	Responsible Person & KPI Data Source
<b>Multimodal Educational Excellence</b> <b>NDNU will optimize a mix of professionally oriented academic programs that meet market demand. These programs will be offered in modalities that work for students. In any modality, programs will provide strong learning outcomes and an exceptional student experience.</b>	Program Mix: Review data on program demand and modality	Annual Student Engagement Survey by CETL/ASC	December 1, 2024, Survey results	Percentage change in on-site vs. Distance program preference from previous survey	Percentage change in on-site vs. Distance program preference from previous survey	Percentage change in on-site vs. Distance program preference from previous survey	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> Randie Sessler Elizabeth Wilcox
	Program Mix: Sunset programs with low demand or potential	Programs	2 undergraduate programs 11 graduate and professional programs 4 credentials	# sunsetted programs	# sunsetted programs	# sunsetted programs	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> Greg Z.
	Program Mix: Move toward higher demand programs – invest in current and create new	Programs	2 undergraduate programs 11 graduate and professional programs 4 credentials	# new programs	# new programs	# new programs	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> Greg Z.
<b>Multimodal Excellence: Enhance quality of courses and faculty knowledge of engaging and equitable practices for diverse learners.</b>	Multimodal Excellence: Enhance quality of courses and faculty knowledge of engaging and equitable practices for diverse learners.	Faculty use Canvas LMS	30%	40%	60%	80%	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> CETL
	Courses meet Universal Design for Learning Guidelines		20%	40%	70%	100%	<b>Responsible Person:</b> Greg Z.

## 2025-2028 NDNU Strategic Plan Key Performance Indicators

	<p>Multimodal Excellence: Develop courses and programs in multiple modalities to meet student needs for flexibility.</p> <p>Multimodal Excellence: Build practical and ethical use of artificial intelligence into all programs.</p>	accessibility standards					KPI Data Source: CETL
		Classes include strategies for workload distribution to provide regular and substantive interaction	20%	50%	70%	100%	Responsible Person: Greg Z.  KPI Data Source: CETL
		Flexible Canvas course shell/template used in online courses	70%	80%	90%	100%	Responsible Person: Greg Z.  KPI Data Source: CETL
		Modified Hyflex classrooms in SM can provide SOE faculty feedback on Hyflex implementation requirements.	0%	0%	100%	100%	Responsible Person: Greg Z.  KPI Data Source: CETL
		Offer students choice within courses of assignments which can be submitted in synchronous or asynchronous modalities	10%	20%	40%	50%	Responsible Person: Greg Z.  KPI Data Source: CETL
		Syllabus templates contain AI information, directives and ethical usage responsibilities	50%	60%	80%	100%	Responsible Person: Greg Z.  KPI Data Source: CETL
		Incorporate AI in learning outcomes	0%	10%	20%	30%	Responsible Person: Greg Z.  KPI Data Source: CETL

## 2025-2028 NDNU Strategic Plan Key Performance Indicators

	Multimodal Excellence: Create incentive structure for faculty to engage in expansion of online learning and related professional development.	Faculty recognized for exemplary course design	5%	10%	20%	30%	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> CETL
		Faculty develop ability to co-train other faculty in online engagement strategies and Canvas technical skills	5%	10%	20%	30%	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> CETL
	Cultivate innovative programs: Distinctiveness. - Hallmarks: what is unique to NDNU	Identify distinctive qualities of an NDNU degree [alums, current students, faculty, staff input]: Hallmarks in courses; how maintain across modalities (in-person, hybrid, online: a/synchronous,  Past survey data; Fall 2024 Student Priority Survey SSI; apply data to review current programs and identify potential new programs  Data from: SOE Exit Surveys SOP Student and Faculty Surveys	Existing Programs	5%	10%	15%	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> Alums, Faculty, Sta` , Students
	Cultivate innovative programs: Offer relevant curriculum.  Online, Hyflex, alternative ways to o'er programs	Modified Hyflex classrooms in SM can provide SOE faculty feedback on Hyflex implementation requirements.	Existing Curriculum	Ongoing qualitative assessment	Ongoing qualitative assessment	Ongoing qualitative assessment	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b>

## 2025-2028 NDNU Strategic Plan Key Performance Indicators

		<p>Continuing Education Program (CEU): Collect market data on evolving future student expectations for online CEU programs.</p> <p>Research Hyflex classroom models at other IHEs +SOE faculty + CTEL input.</p> <p>SSI Data</p> <p>Data from: SOE Exit Surveys SOP Student and Faculty Surveys</p> <p>Establish a CEU Task Force to identify and pursue accreditation requirements</p>					<p>Hyflex: CTEL, Faculty, student feedback</p> <p>CEUs: Alum feedback in licensure programs requiring ongoing professional development</p>
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# 2025-2028 NDNU Strategic Plan Key Performance Indicators

## GOAL FOUR

	Implementation Strategy	KPI, Metric, Monitoring	Baseline Measure	FY25-26	FY26-28	FY27-28	Responsible Person & KPI Data Source
<b><u>Student Experience / Centeredness / Community</u></b>  <b>Enhance and expand current services and resources to better anticipate and respond to student needs. These services and resources, including infrastructure, will support and empower student voices; offer meaningful feedback to strengthen curriculum and practices; and swiftly adapt to increased enrollment and new program offerings.</b>	Offer Hyflex learning spaces with a/synchronous learning.	Existing facilities	0%	0%	100%	100%	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> CTEL
	Democratize online learning for all students by providing essential equipment, training, and support services.  Embed essential technical training in online student onboarding processes.	Annual Student Engagement Survey by CTEL/ASC  OIT helpdesk ticket data	December 1, 2024 student engagement levels in Annual Student Engagement Survey results  2024 OIT ticket requests	5% increase in engagement  5% decrease in OIT tickets	5% increase in engagement  5% decrease in OIT tickets	5% increase in engagement  5% decrease in OIT tickets	<b>Responsible Person:</b> Randie Sessler Elizabeth Wilcox IT  <b>KPI Data Source:</b> CTEL
	Acculturate the faculty and staff towards a modern university.	Establish orientation, training, and onboarding processes for staff and faculty that reflect the demands of a modern multimodal institution.	0 trainings	1	2	3	<b>Responsible Person:</b> Greg W. Randie Sessler  <b>KPI Data Source:</b> ASC

# 2025-2028 NDNU Strategic Plan Key Performance Indicators

## GOAL FIVE

	Implementation Strategy	KPI, Metric, Monitoring	Baseline Measure	FY25-26	FY26-28	FY27-28	Responsible Person & KPI Data Source
<b>Establish new and enhance existing external partnerships and alumni relations.</b>	This would enable creating stronger advisory boards and increase knowledge of developing employer needs. Most importantly, it will create pipelines for student enrollment and opportunities for student teaching, clinical placements, internships, and OPT (Optional Practical Training) options.	Current partnerships	<p><b>SOE:</b> Partnerships programs with 61 schools, districts, county offices of education, non-profit education-based organization across the Bay Area, in states with which NDNU has agreement, in India to recruit/train candidates and provide research and practicum sites.</p> <p><b>SOP:</b> Partnerships with 9 local agencies and an additional 39 Bay Area agencies. With the addition of online programs, the network of practicum sites continues to grow, providing students with extensive opportunities for clinical training across California.</p> <p><b>SBM:</b> articulation agreement with UC Santa Cruz Extension Ed Business Certificate program</p>	5%	10%	15%	<b>Responsible Person:</b> Tanya Tran School Deans  <b>KPI Data Source:</b> SOE – Kelly V. SBM – John V. SOP – Helen M.

## 2025-2028 NDNU Strategic Plan Key Performance Indicators

			for candidates to transfer all units into the MBA Program; currently building partnerships in to recruit students in India and China.				
	Alumni Relations	Continue work of Alumni Advisory Council	Ongoing	New initiatives	New initiatives	New initiatives	<b>Responsible Person:</b> Greg Z.  <b>KPI Data Source:</b> Aric Agresti

# NDNU SWOT Analysis - 2024

<p><b>NDNU Strengths</b></p> <ul style="list-style-type: none"><li>- Location &amp; long history</li><li>- Degrees granted</li></ul> <p><b>Administration</b></p> <ul style="list-style-type: none"><li>- New teams &amp; nascent processes</li><li>- Accreditation successes</li><li>- Strong conversion from applications</li></ul> <p><b>Programs</b></p> <ul style="list-style-type: none"><li>- Targeted programs with committed faculty</li><li>- Local networks and alumni</li></ul>	<p><b>NDNU Weaknesses</b></p> <ul style="list-style-type: none"><li>- Recent history &amp; future uncertainty</li><li>- Flagging differentiation in branding &amp; vision</li></ul> <p><b>Administration</b></p> <ul style="list-style-type: none"><li>- Problems in integrating teams &amp; processes</li><li>- Lack of data to drive strategy &amp; decisions</li><li>- Legacy of failed teams &amp; strategies in recent past</li></ul> <p><b>Programs</b></p> <ul style="list-style-type: none"><li>- Quality of courses and faculty training</li><li>- Programs &amp; modalities not driven by data</li></ul>
<p><b>NDNU Opportunities</b></p> <ul style="list-style-type: none"><li>- Leverage new partnerships for programs/recruiting</li><li>- Leverage location for programs/recruiting</li></ul> <p><b>Administration</b></p> <ul style="list-style-type: none"><li>- Design NDNU 2.0 around strategy &amp; vision</li><li>- New campus designed to support NDNU 2.0</li></ul> <p><b>Programs</b></p> <ul style="list-style-type: none"><li>- Data-driven new programs &amp; modalities</li><li>- Innovative partnerships</li></ul>	<p><b>NDNU Threats</b></p> <ul style="list-style-type: none"><li>- Increased competition in NDNU brand space</li><li>- Declining domestic student populations</li><li>- Competition for international students</li></ul> <p><b>Administration</b></p> <ul style="list-style-type: none"><li>- Other competitors are changing more quickly</li><li>- Financing for operations dependent on external sale</li></ul> <p><b>Programs</b></p> <ul style="list-style-type: none"><li>- Professional programs demand change quickly</li><li>- Lack of faculty &amp; admin staff to support change</li></ul>



NOTRE DAME  
DE NAMUR UNIVERSITY  
*100 Years in Belmont*

# Environmental Scan

# 2024

Dr. Cherron Hoppes  
Chief Experience Officer



# Agenda

1. National Trends Since 2020
2. Regional Trends Since 2020
3. Questions From the Board
4. Current/Future State Policy & Perception Implications



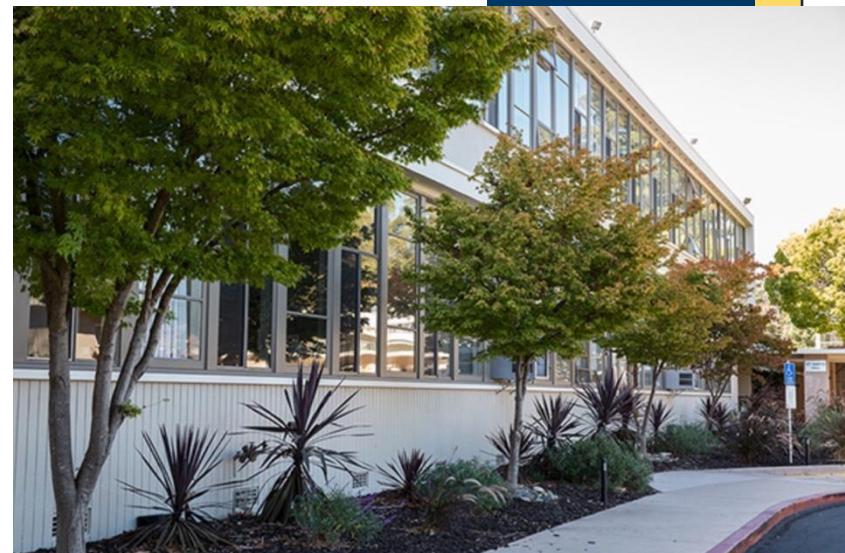


# National Trends

# National Trends

## Graduate Enrollment Highlights

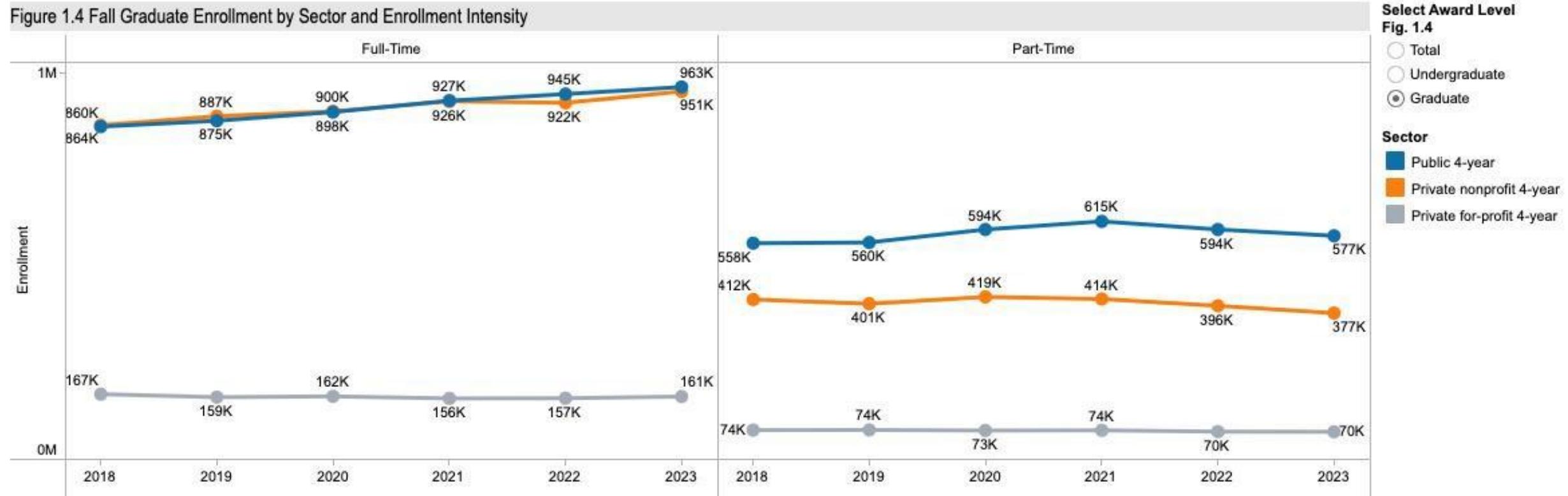
- The growth bubble of 2020 has yet to prove to be a trend.
- The most significant growth has been in the Public 4-year sector in computer science related programs.
- While there are slight declines in part-time enrollment, there is growth in full-time programs (29K year-over-year, in private, non-profit programs).





## Graduate Enrollment Patterns – 2019 to 2023

Figure 1.4 Fall Graduate Enrollment by Sector and Enrollment Intensity

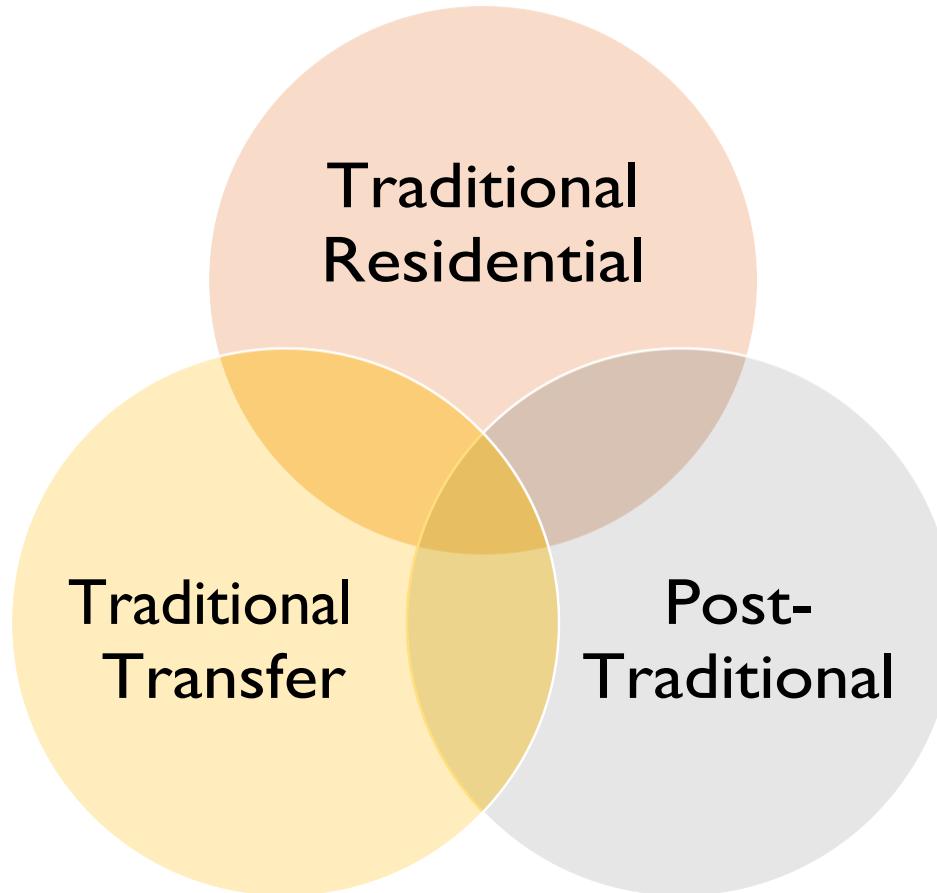


# NDNU's Major Families – A Look at National Trends

Major Family	2020 Enrollment	2021 Enrollment	% Change from Prior Yr	2022 Enrollment	% Change from Prior Yr	2023 Enrollment	% Change from Prior Yr
<b>Business, Management &amp; Marketing</b>	483,836	482,794	-0.02%	457,923	-5.2%	448,449	-2.1%
<b>Education</b>	463,667	454,742	-1.9%	430,866	-5.3%	442,302	-2.0%
<b>Psychology</b>	140,150	147,927	5.5%	148,215	0.2%	147,537	-0.5%
<b>Public Administration &amp; Social Work</b>	129,979	132,804	2.2%	126,672	-4.6%	122,355	-3.4%

We will examine NDNU's trajectory in the next section...

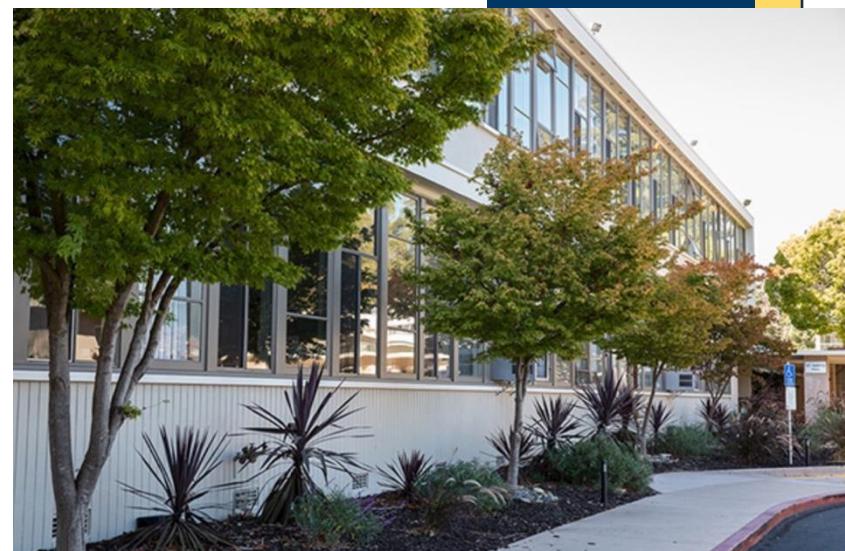
# Understanding the Undergraduate Market



# National Trends

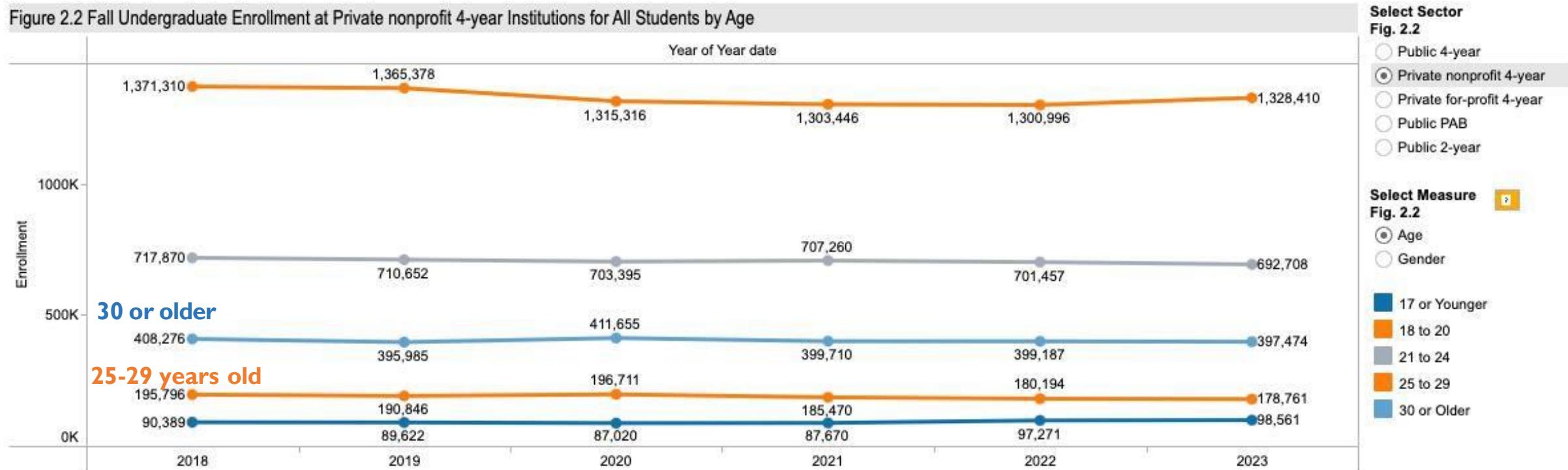
## Post-Traditional Undergrad Highlights

- As of July 2021, nearly 40.4 million adults have some college and no credential (SCNC).
- From 2020 to 2021, 80,000 fewer SCNC adults re-enrolled in college. This has been an ongoing trend for over 5 years (with a slight growth bubble in 2020, much like with graduate programs).



Causey, J., Gardner, A., Pevitz, A., Ryu, M., and Shapiro, D. (April 2023), [Some College, No Credential Student Outcomes, Annual Progress Report – Academic Year 2021/22](#), Herndon, VA: National Student Clearinghouse Research Center

Figure 2.2 Fall Undergraduate Enrollment at Private nonprofit 4-year Institutions for All Students by Age



# National Trends

## Modality Preferences



A March 2023 electronic survey of 1,502 prospective graduate students who:

- Being recently enrolled in graduate study (last three years), currently enrolled in graduate study, or planning to enroll in graduate (within the next two years).
- Enrolled in (or planning to enroll in) a master's or doctoral degree program or a credit-bearing post-baccalaureate or graduate level certificate program.
- Being at least 20 years of age.



## In which instructional format did/will you enroll in graduate classes?



## Chosen instructional format by age

FORMAT	20-24	25-29	30-39	40-49	50+
All online	30%	39%	48%	54%	50%
Partially online	40%	42%	40%	40%	43%
All classroom	30%	19%	13%	6%	7%

# Changing Expectations



**How far from where you reside (or resided at the time) was the furthest school/program you considered?**



**38%**

Within 25 miles

**27%**

25-50 miles

**11%**

51-75 miles

**6%**

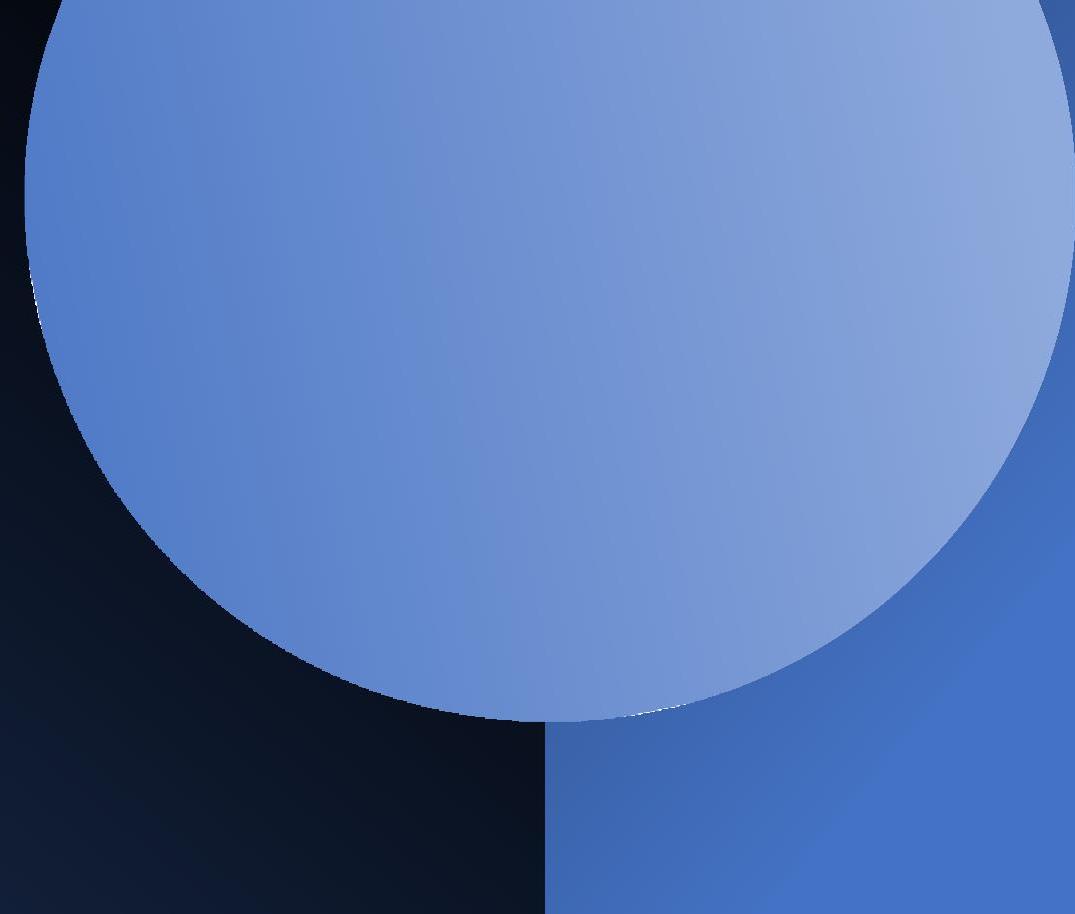
75-100 miles

**17%**

More than 100 miles

**Distance from home by format**

<b>DISTANCE</b>	<b>ALL ONLINE</b>	<b>PARTIALLY ONLINE</b>	<b>ALL CLASSROOM</b>
Within 25 miles	40%	37%	34%
25-50 miles	25%	31%	26%
51-75 miles	11%	14%	8%
75-100 miles	6%	6%	6%
More than 100 miles	19%	12%	25%



# Regional Trends



# Regional Trends



## Graduate Enrollment Highlights

- California has seen a more considerable decline in graduate enrollment than many other states but is similar to other states in the western region of the US.
- NDNU's programs are in the Top 10 of student interest in California. However, state data indicates enrollment in those same programs have seen a year-over-year decline.

Figure 5.3 Graduate Enrollment by Sector: California

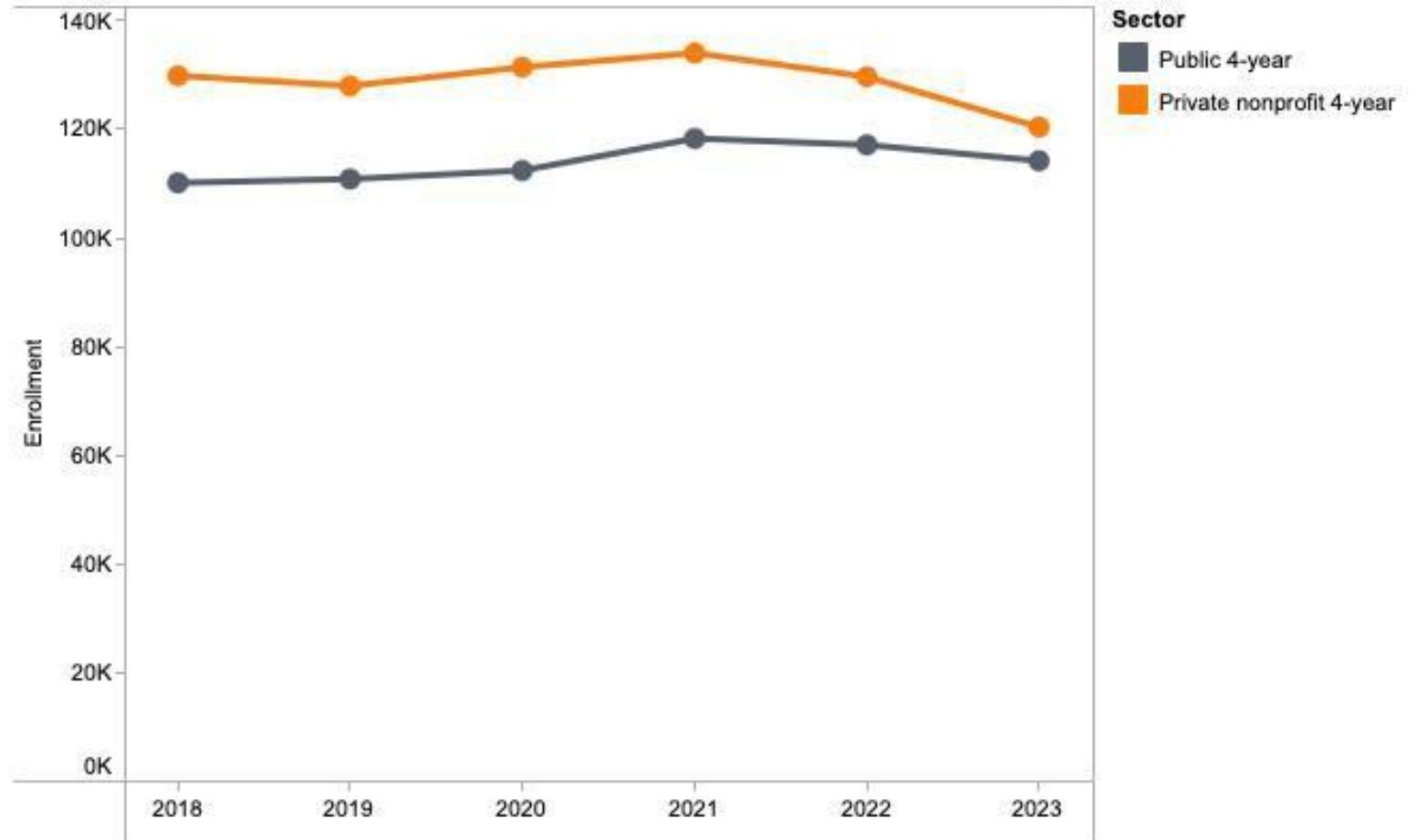
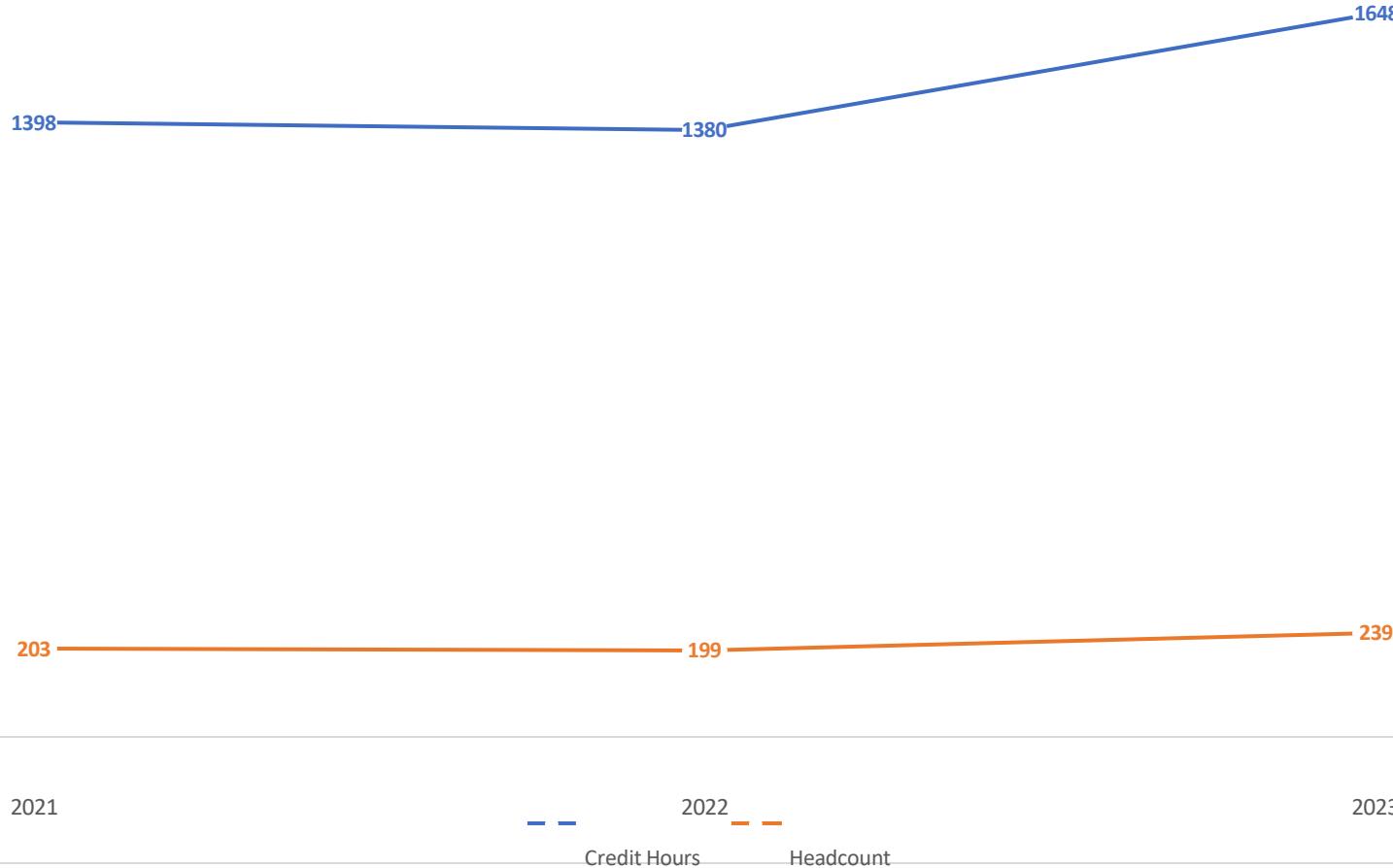


Figure 6.4 Graduate Enrollment in Top 10 Major Field Families: California

	2018		2019		2020		2021		2022		2023	
	Enrollment	% Change From Previous Year										
Health Professions and Related Clinical Sciences	39,646		41,350	4.3%	42,192	2.0%	44,095	4.5%	43,619	-1.1%	42,783	-1.9%
Education	37,656		34,790	-7.6%	35,402	1.8%	34,760	-1.8%	32,337	-7.0%	28,608	-11.5%
Business, Management, Marketing, and Related Support	27,219		26,773	-1.6%	29,947	11.9%	31,240	4.3%	29,024	-7.1%	26,907	-7.3%
Psychology	15,835		16,588	4.8%	19,046	14.8%	20,886	9.7%	21,351	2.2%	20,682	-3.1%
Engineering	20,446		20,292	-0.8%	19,163	-5.6%	20,436	6.6%	20,734	1.5%	20,378	-1.7%
Legal Professions and Studies	14,883		14,962	0.5%	15,100	0.9%	16,315	8.0%	15,532	-4.8%	15,516	-0.1%
Computer and Information Sciences and Support Services	10,574		11,027	4.3%	10,730	-2.7%	12,382	15.4%	14,418	16.4%	15,315	6.2%
Biological and Biomedical Sciences	8,801		9,089	3.3%	9,326	2.6%	9,593	2.9%	9,951	3.7%	10,104	1.5%
Public Administration and Social Service Professions	12,771		12,011	-6.0%	11,840	-1.4%	11,706	-1.1%	10,984	-6.2%	9,945	-9.5%
Physical Sciences	7,069		7,229	2.3%	7,310	1.1%	7,598	3.9%	7,470	-1.7%	7,318	-2.0%

## THE NEW NDNU ENROLLMENT TRAJECTORY





# Regional Trends



## Post-Traditional Enrollment Highlights

- In California, 6.5%, or 429,601 of all UG students are considered Some College, No Credential (SCNC) potential returners.
  - 1.1% of those students enroll at private, non-profit colleges and universities.



Only **49%** of SCNC students  
enrolled in 2020 re-enrolled in  
2021

*Have we failed these students in some way?*

## Most significant concerns for post-traditional learners:

- Balancing work, school, and family
- Accessibility/availability of classes
- Cost – transferability and time also have value
- Returning after a long hiatus
- Navigating the initial steps of returning – appropriate support systems



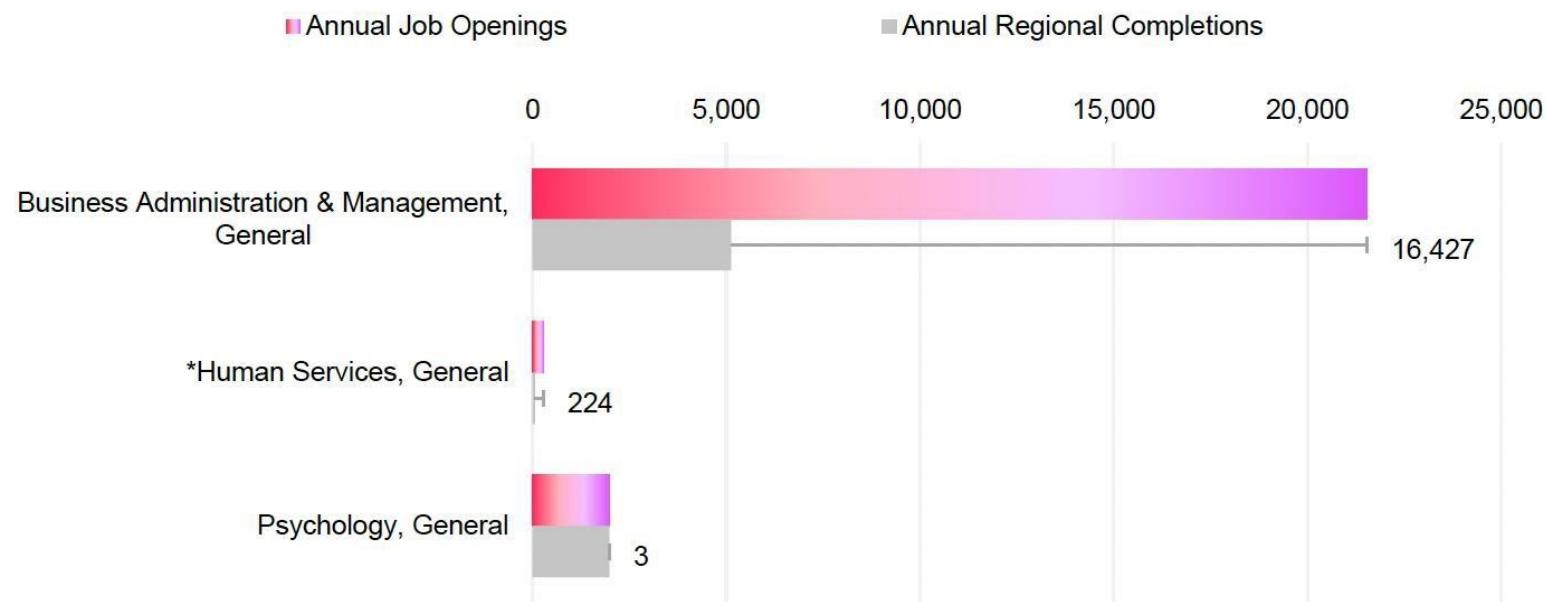
# Regional Trends



## Employer Demand Highlights

- The variables of the employment market have a strong influence over opportunity for colleges and universities:
  - A negative impact in a field can immediately result in an enrollment decline.
  - A positive impact in a field is challenging to catch given structures that prevent colleges and universities from being nimble.
- Highly qualified candidates present with a quality educational experience and can speak to specific skills learned in their programs.

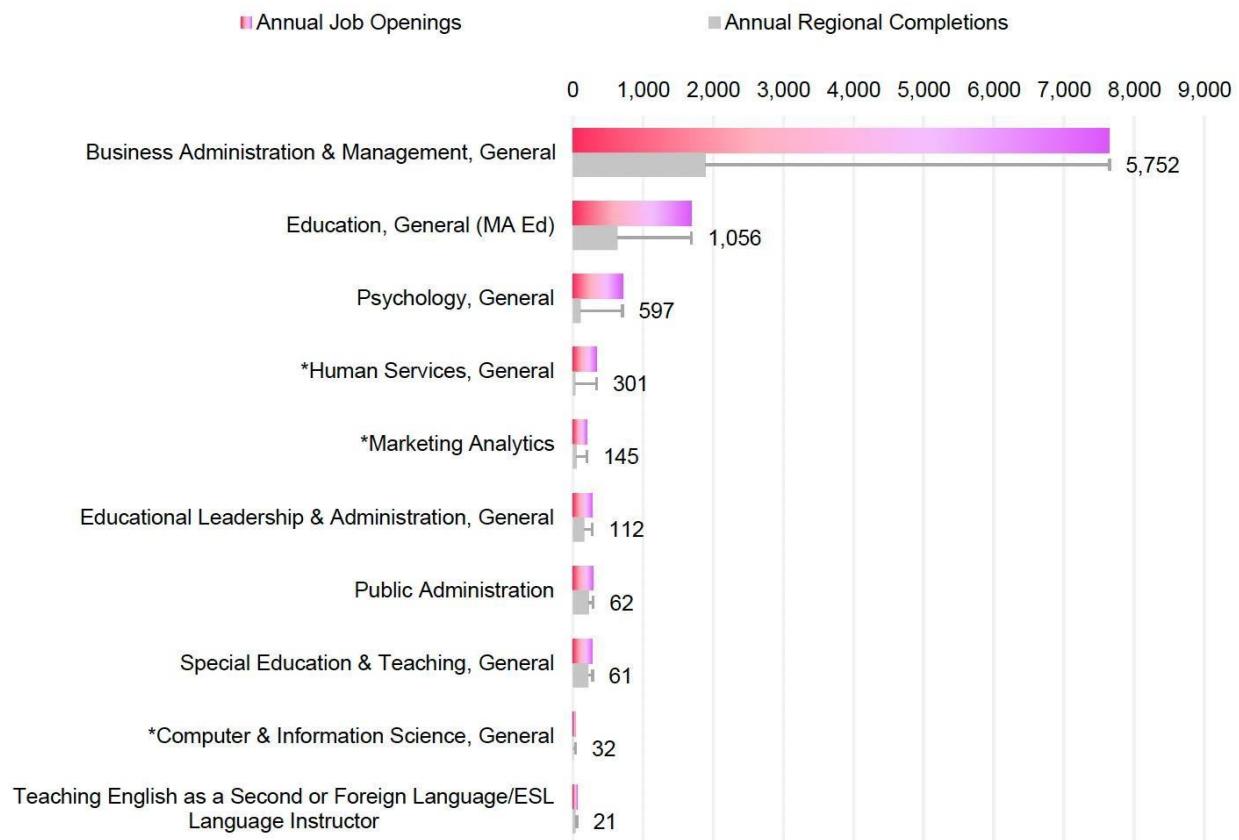
Figure 4: Bachelor's Degree Level Gaps



\*NDNU does not currently offer a Human Services bachelor's degree. The program is being evaluated as a new program opportunity using the average annual program size in California to simulate potential future supply of program completers for this analysis.

Source: Lightcast program demand gap model.

Figure 5: Master's Degree Level Gaps



\*NDNU does not currently offer these master's degree programs. The programs are being evaluated as new program opportunities using the average annual program size in California to simulate potential future supply of program completers for this analysis.

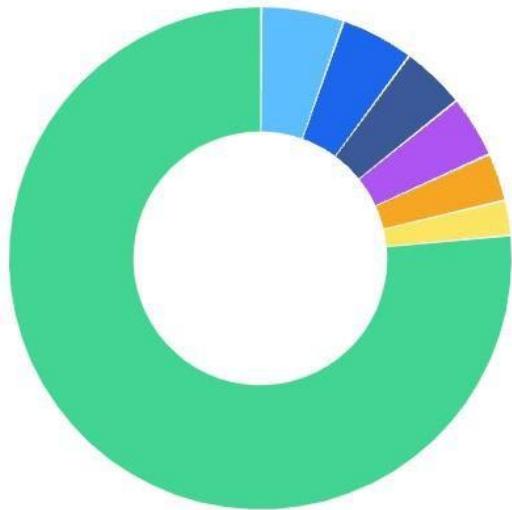
Source: Lightcast program demand gap model.



## Business & Related Fields



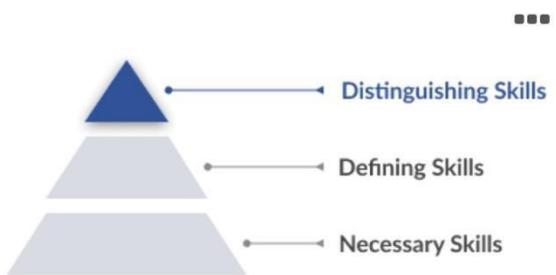
# The Vast Array of Opportunity for Business Graduates



Industry	% of Occupation in Industry (2024)
Management, Scientific, and Technical Consulting Services	5.3%
Management of Companies and Enterprises	4.7%
Computer Systems Design and Related Services	4.1%
Employment Services	4.0%
Local Government, Excluding Education and Hospitals	3.1%
Scientific Research and Development Services	2.3%
Other	76.5%

## Top Distinguishing Skills by Demand

An occupation's Distinguishing Skills are the advanced skills that are called for occasionally. An employee with these skills is likely more specialized and able to differentiate themselves from others in the same role.



Skill	Salary Boosting	Job Postings Requesting	Projected Growth	Growth Relative to Market
Product Marketing	✓	3,135	+16.3%	Growing
Marketing Management	✗	2,317	+5.6%	Stable
Content Creation	✗	2,038	+8.8%	Growing
Brand Awareness	✓	1,809	+5.5%	Stable
Marketing Materials	✗	1,632	+23.1%	Rapidly Growing
Data-Driven Decision Making	✓	1,550	+7.6%	Stable
Target Audience	✗	1,480	+7.4%	Stable
Email Marketing	✓	1,425	+12.5%	Growing
Google Analytics	✓	1,383	+11.7%	Growing
Competitive Analysis	✗	1,343	+10.9%	Growing



# Counseling & Psychology



- Licensed counselor positions should experience 10.1% growth from 2024 to 2029. National growth during this same period will be 12.4%.
- California has significantly more jobs for counselors than seen elsewhere. The national average for a comparable region is 17,376. In California, there are 44,005 employees in this occupation group.
- The real concern is regarding wages for California counselors. Nationally, the median salary is \$73,310. In California, it is \$51,275, creating a challenge for identifying a compelling ROI as it relates to a living wage.





# Education





- From 2024 to 2029, job growth for K-12 educators and administrations is expected at 5.6%.
- California teachers are among the highest paid teachers the United States.
  - The state's median salary is \$98,314 per year.
  - Yet, a March 2024 assessment indicates a single person would need to make \$89,190 per year to live comfortably. In the Bay Area, that salary needs to be closer to \$118,000 annually.

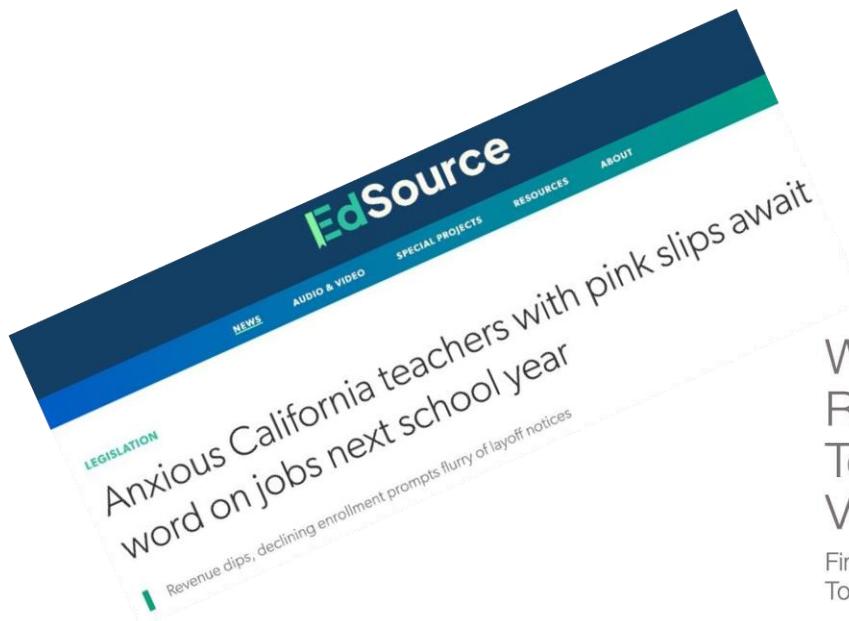
# This is not a training capacity issue...

**Table 1c: New Teaching Credentials Issued to Candidates Prepared by California Institutions of Higher Education (IHE)\*, 2018-19 to 2022-23**

<b>Credential Type</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>Percent Change from 2021-22</b>
Multiple Subject	5,447	6,248	7,598	5,085	4,296	-15.5%
Single Subject	5,037	5,127	5,393	4,602	4,455	-3.2%
Education Specialist	2,272	2,735	2,989	2,386	1,912	-19.9%
<b>Total</b>	<b>12,756</b>	<b>14,110</b>	<b>15,980</b>	<b>12,073</b>	<b>10,663</b>	<b>-11.7%</b>

*\*IHE prepared includes both traditional and intern delivery models.*

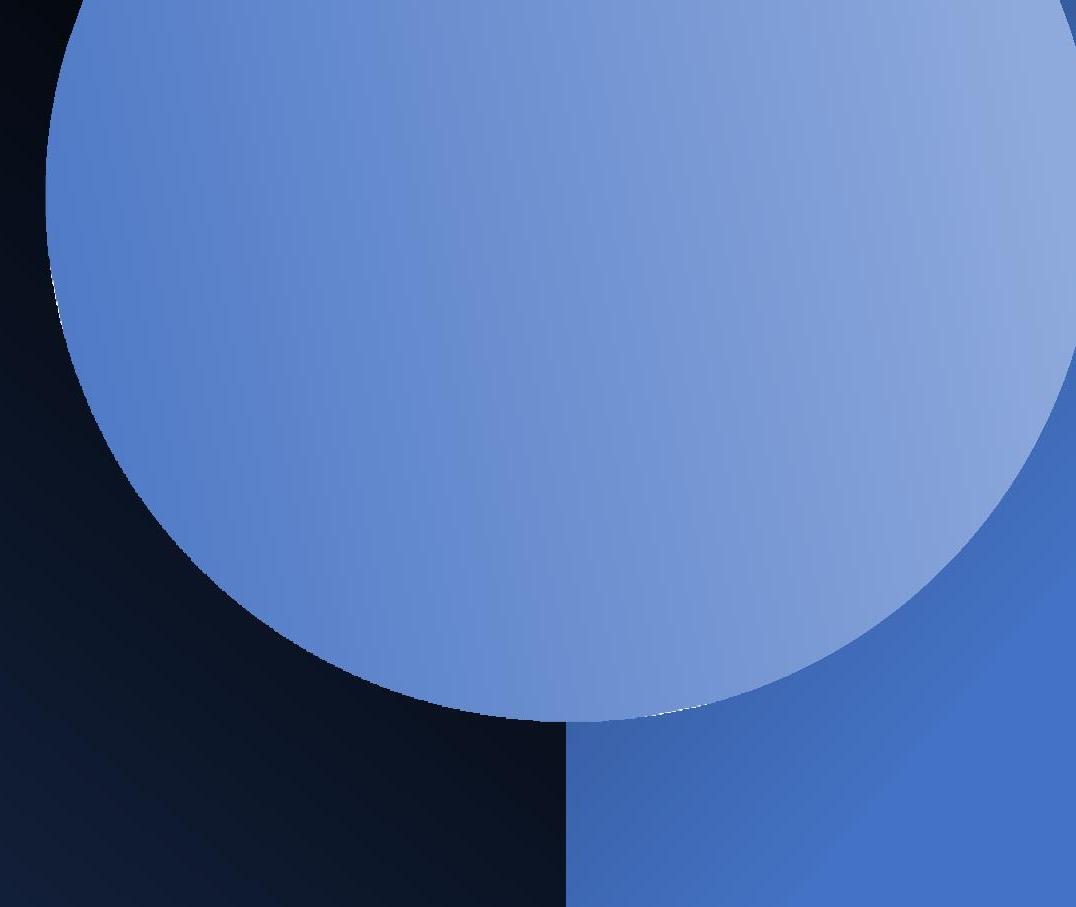
# The headlines are not promising...



Working Conditions  
Related to Positive  
Teacher Well-Being  
Vary Across States

Findings from the 2022 Learn  
Together Survey





**From the NDNU Board of Trustees**

# Questions From the Board

---

- Who are our competitors? (Who is getting the students NDNU is not getting)
- What are our competitors doing? What can we learn from them.
- What are they doing to make them successful? How long did it take?
- What mistakes have others made?



# A Note About Our Competitors

- There are three primary ways to define a competitor set:
  - Peer Group
  - Aspirational Institutions
  - Perceptions of prospective and departing students
- The ideal way to find competitors is through the National Clearinghouse
  - Applicants who were admitted but did not enroll
  - Stop out students who enrolled elsewhere

# Our Competitors

---

- Within 150 miles.
- Private not-for-profit.
- Have two or more competing graduate programs.
- Offer programs in multiple modalities.
- Because of the lack of available data for post-traditional undergraduate enrollment, the focus is on the graduate competitor set. Often, these same institutions also offer degree completion programs.



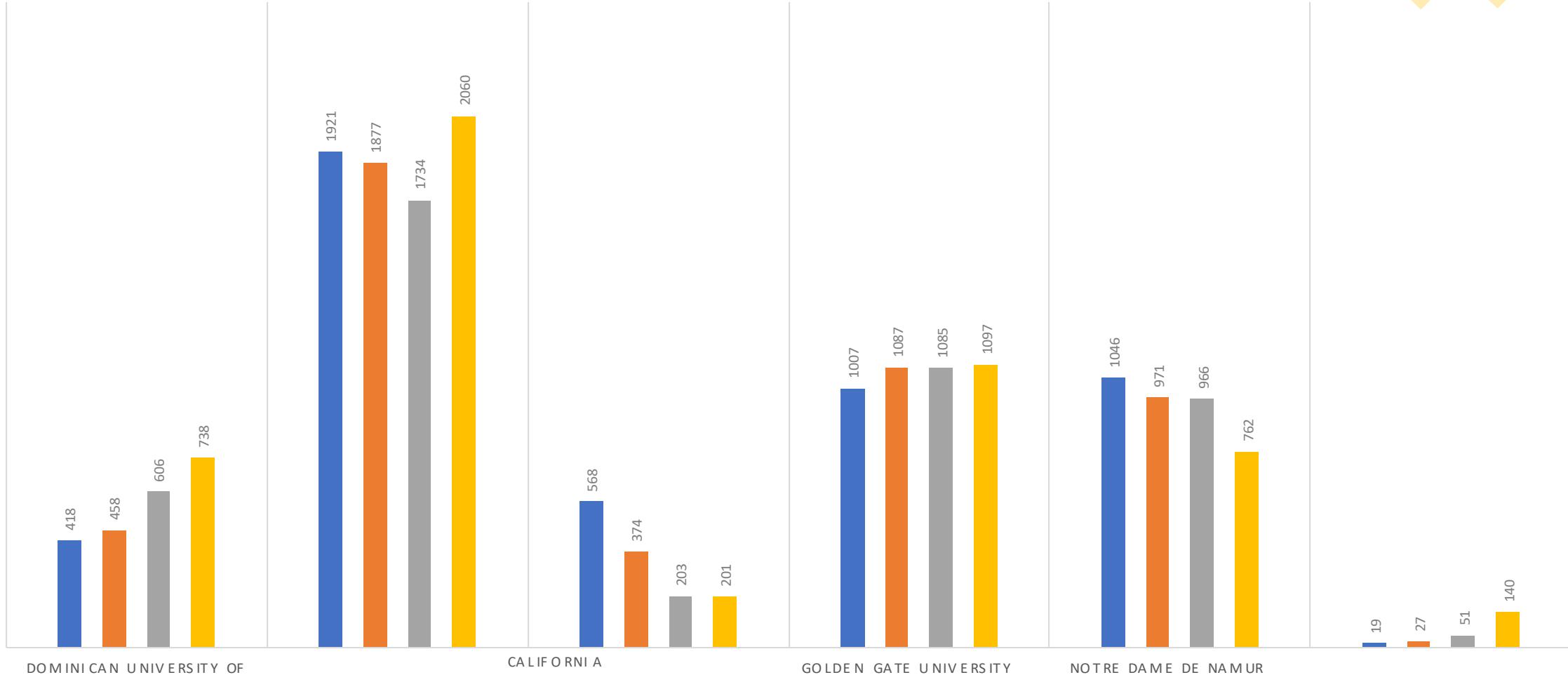


\*Formerly Northwestern Polytechnic University



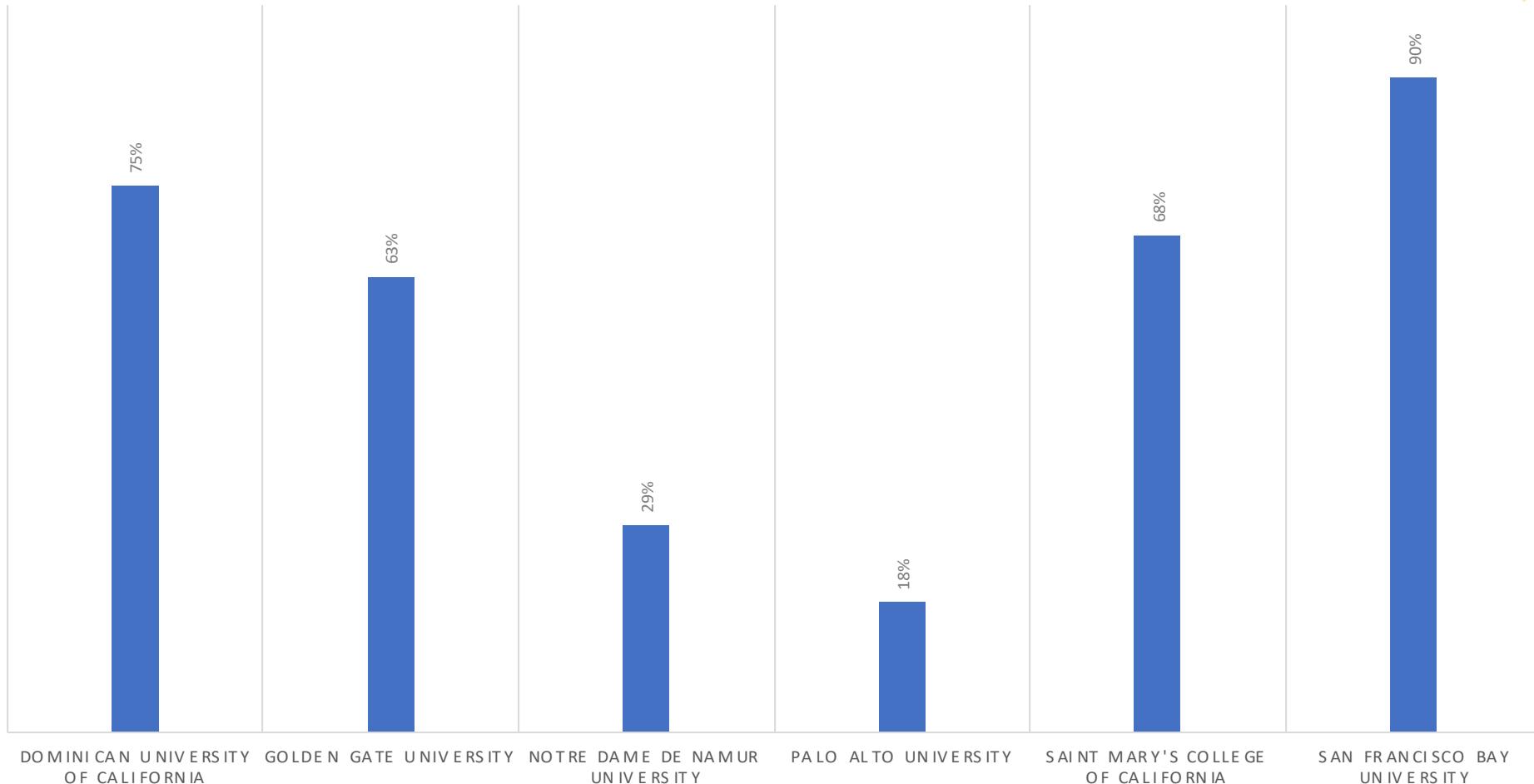
## CONFERRALS - GRADUATE PROGRAMS

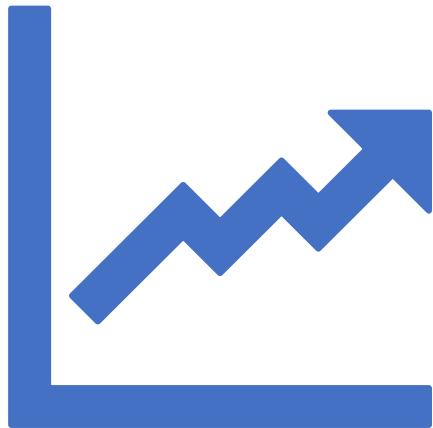
■ 2019 ■ 2020 ■ 2021 ■ 2022





## GROWTH IN DISTANCE EDUCATION 2021 TO 2022



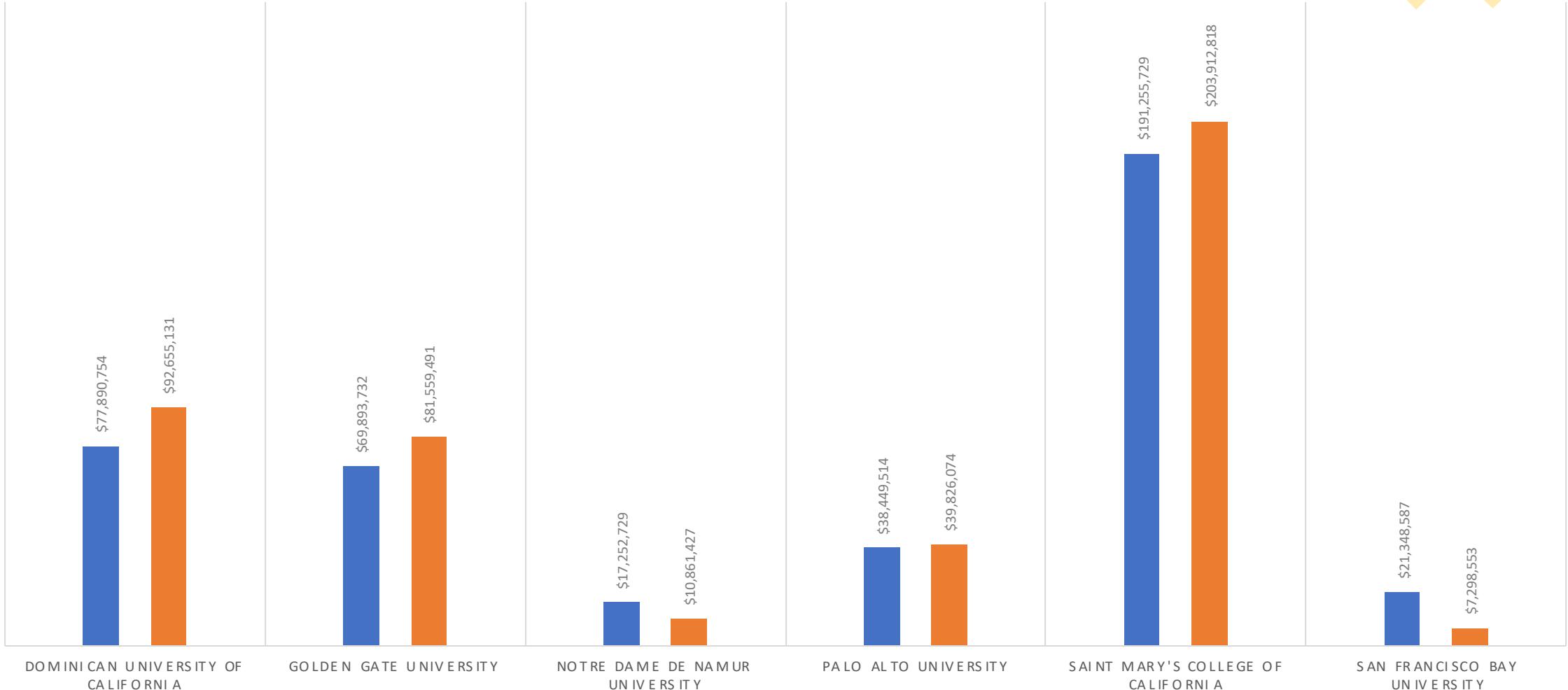


## KEY PERFORMANCE INDICATORS

Data for private, not-for-profit universities is found in the IRS Form 990. Currently, tax information for each institution is 2021 calendar/tax year and older.

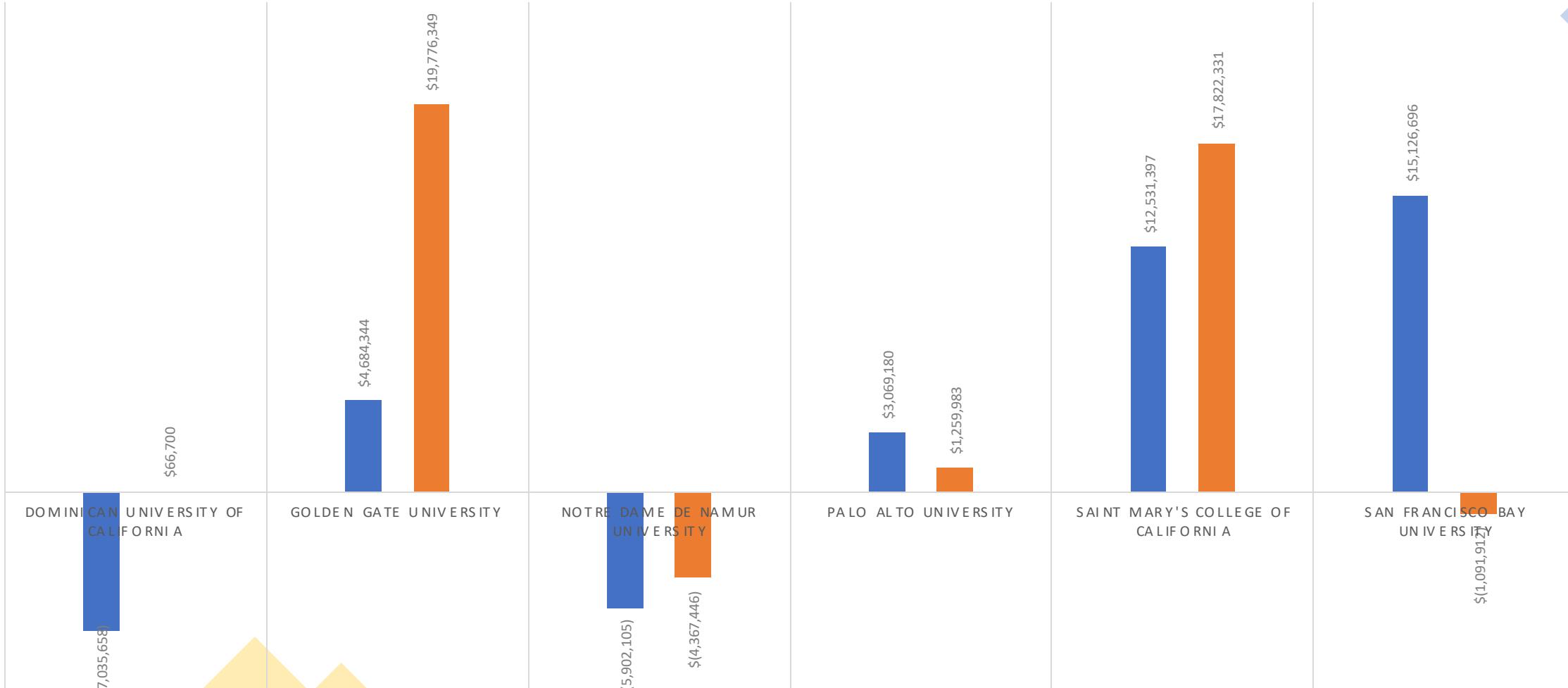
## REVENUE

■ 2020 ■ 2021



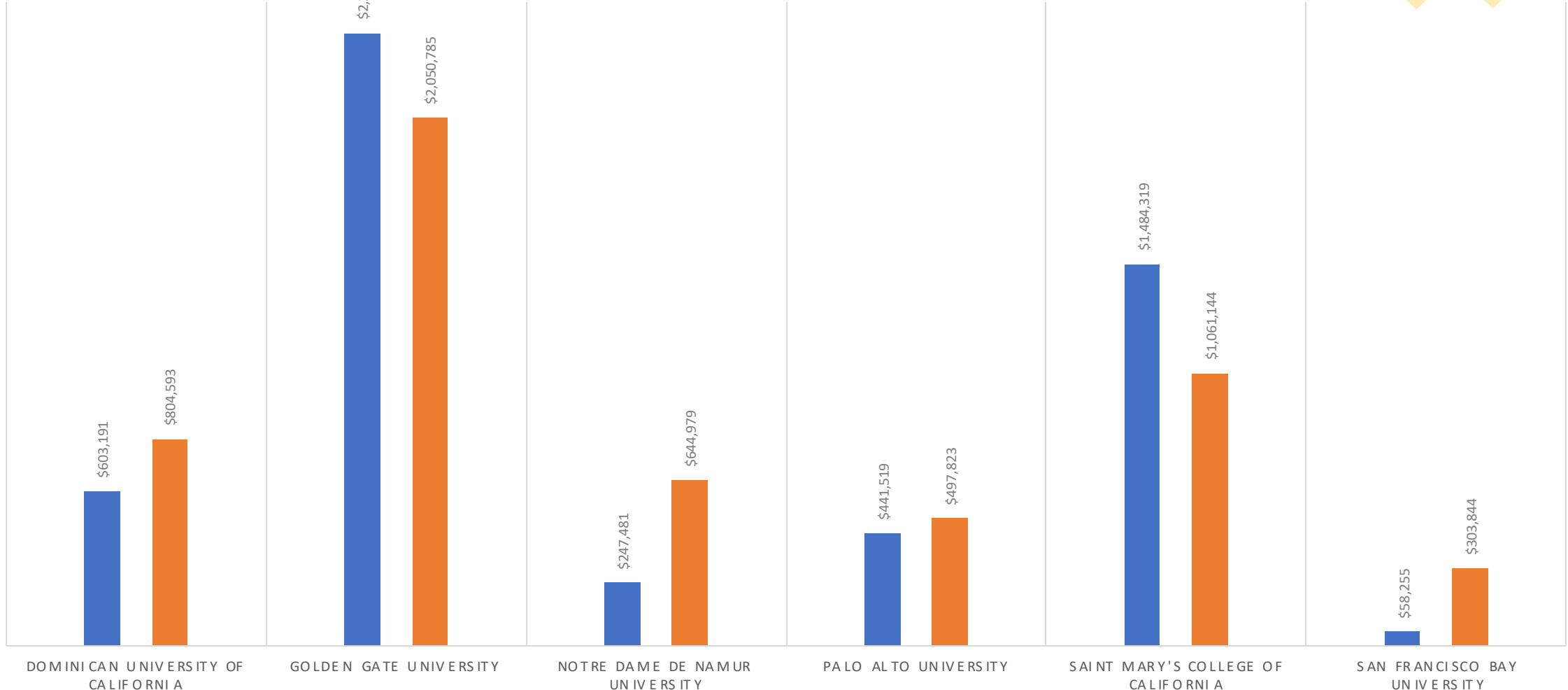
## OPERATIONAL SURPLUS/DEFICIT

■ 2020 ■ 2021



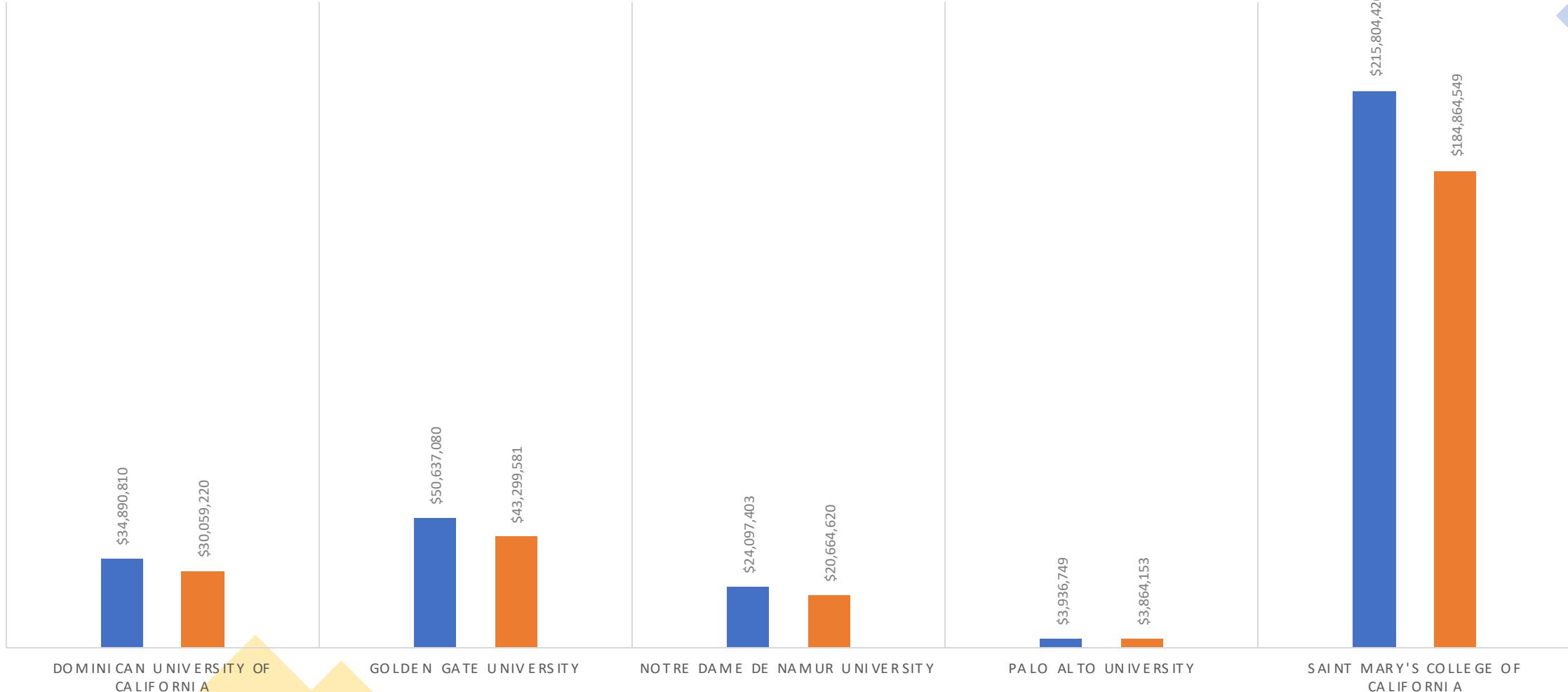
## ADVERTISING & PROMOTION

■ 2020 ■ 2021



## ENDOWMENT

■ 2020 ■ 2021

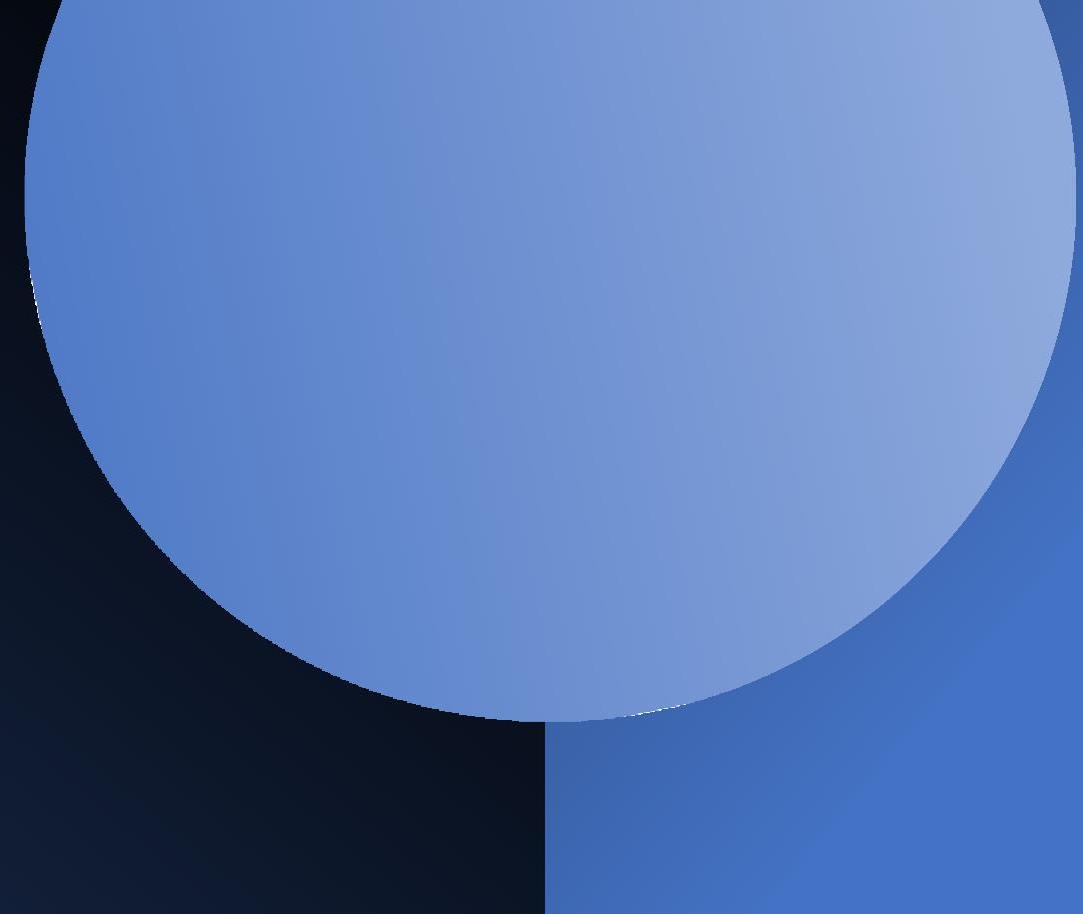


# What are they doing to be successful?

- Doubling down on prior success
  - Blended international study (GGU)
- Going where there is market interest
  - Growth in online and blended learning (Dominican)
- Vision and gumption
  - Innovative and bold leadership (San Francisco Bay University)

# What is NDNU's Turnaround Story?

- Since the pivot, circumstances in higher education are unlike any time in modern history:
  - COVID-19 impacts on the learning experience
  - Marketing costs have skyrocketed – increases of nearly 40% for private, not-for-profit institutions
- Overcoming a negative story presents a greater challenge than telling a positive story:
  - Perceptions in the media were that the university was closing.



# **Successful Turnarounds in Higher Education**

# The Sweet Briar College Story

When announcing its closure, it was because the university missed its necessary enrollment goal of 200 new undergraduates for Fall 2014 and it seemed unlikely that things would change for Fall 2015.

Even in a turnaround "success" nearly 10 years later, the institution cannot reach that much sought after goal.

Admission Summary, 2022-23 First-Time in College								
Domicile	Applied	Accepted	Acceptance Rate	Enrolled	Yield Rate	Rejected	Rejection Rate	
In-State	370	355	96%	68	19%	15	4%	
Out-of-State	597	566	95%	86	15%	31	5%	

# The Sweet Briar College Story

Sweet Briar College  
announces its  
pending closure.



Fall Headcount Enrollment					
Fall Term	Undergraduates	Graduate Students	Total First Professionals	Total	
Fall 2014	691	9	0	700	
Fall 2015	316	4	0	320	
Fall 2016	365	11	0	376	
Fall 2017	319	3	0	322	
Fall 2018	329	1	0	330	
Fall 2019	355	3	0	358	
Fall 2020	356	6	0	362	
Fall 2021	453	1	0	454	
Fall 2022	454	3	0	457	
Fall 2023	464	0	0	464	

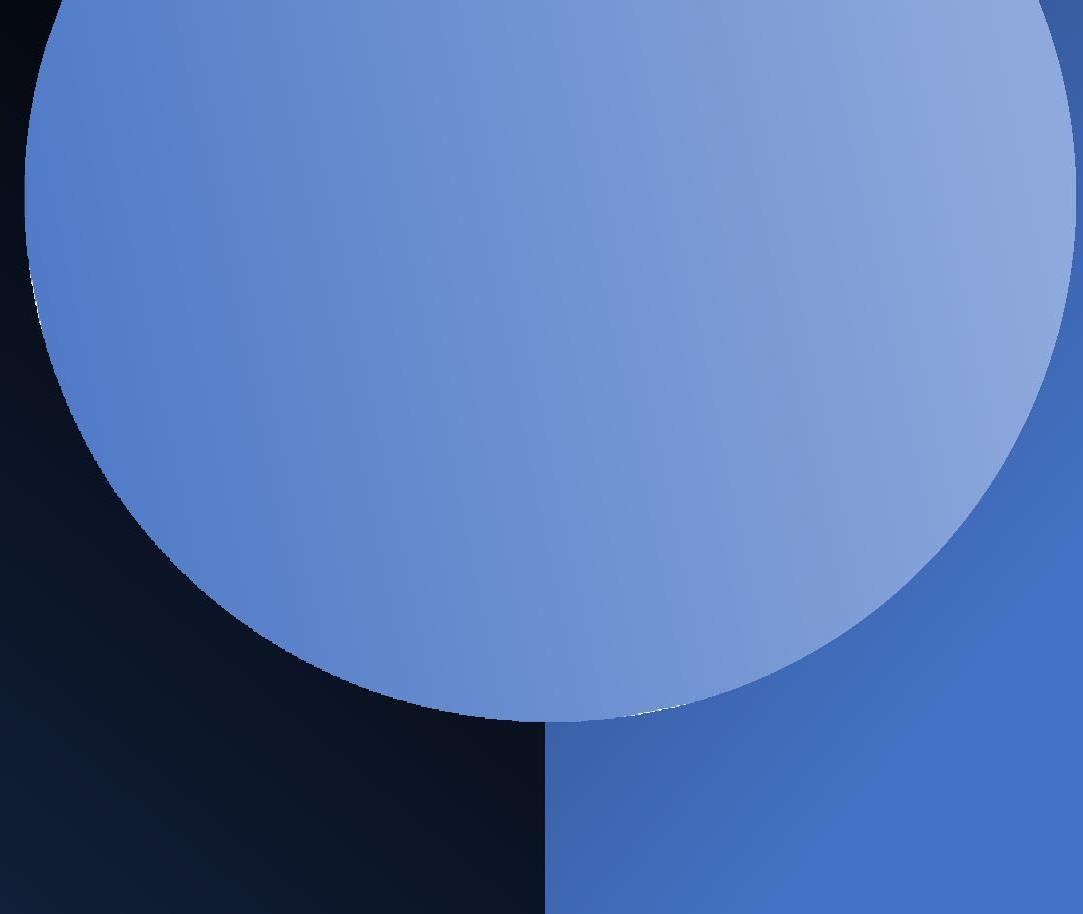
# Conditions Required for a Turnaround

- The existence of a core business with a product or service that customers want.
- The right people to turn the business around.
- The availability of adequate financing to survive during the time it would take to see the results of the business turnaround.

# Summary Lessons from Higher Education Turnaround Leaders

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- Be realistic.
  - Understand the position of the university and the opportunity in the market.
- Define health carefully.
- Identify the most critical key performance indicators (KPIs) and track them with a vengeance.
  - Data informed decision making is a strong indicator of success.
- Prepare for a long campaign at high speed.
- Frequent access to the Board for swift decision making and support.
- Know the difference between late and too late.
- Leverage partnerships.
- Refocus on students.



# The Current & Future State of Higher Education



## **Current/Future State Policy & Perception Implications**

- The “Simplified” FAFSA
- The Value of College
- Economic Impacts
- Geo-political Impacts

# The “Simplified” FAFSA

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- A legislative mandate required simplification of the process for students and families to apply for federal financial aid programs.
  - Project was to be completed and ready for 2024-2025 applications in October 2023
    - It went live on December 31, 2023, and was open for three hours before going down
    - Ongoing technical issues have created a nightmare for prospective students and families and institutions resulting in:
      - Incorrect financial aid data and awards
      - Broken processes to correct errors
      - Poor customer support
  - The result is that to date, FAFSA submissions are down over 25% from the same time last year.

# The Value of College

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- Over the past two decades, as college costs have escalated, perceptions about the value of a college degree have declined precipitously.
  - Media attention to high debt loads for graduates, poor employment outcomes for a small handful of degree programs, and high demand for vocational/trade workers as contributed to the perceptions held by many.
  - Colleges and universities have failed to make a compelling value argument for the time and expense of obtaining a degree in this current environment.
- The poor learning experience of COVID emergency remote teaching for this crop of prospective college-bound students as left with the knowledge that their experience was “BAD” but there is value in learning that is not locked into time and place.
  - The result is a desire for online learning, under some circumstances, but few institutions equipped to provide a high-quality learning experience that demonstrates value for the expense.
- Employers must now pay above minimum wage to attract and keep workers, lessening the window of earnings between no college, some college, and a degree.
- Many employers are reassessing requirements for specific job categories and determining that a degree is not required after all, reversing years of degree inflation in the workplace.

# Economic Impacts

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- Overall perception of the state of the economy is a mixed bag.
  - Many tout the success of the stock market and related investment growth.
  - Unemployment is at an all-time low nationally and in most regions.
  - Skyrocketing interest rates result in a sense of instability in the housing market.
  - Costs of groceries and dry goods, until recent weeks, have spiraled upward at an unprecedented rate.
- In most times of economic uncertainty, enrollment has grown in post-traditional degree programs and graduate programs.
  - That is not the case in these current times.
- Some presumed causes for enrollment declines are:
  - Demographic cliff of available college going students.
  - Declines in employer supported education benefits.
  - Perceptions regarding the value of a college degree.
  - Return on Investment – costs of money and time do not always conclude with a positive outcome.

# Geo-Political Impacts

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- Overseas unrest and war push educational opportunities down on the prioritization list.
- Many of the same economic conditions impacting the United States are experienced for other nations who traditionally sent students here for post-secondary education.
- The uncertainty of the outcome of the election in November brings into question the viability of international student enrollment programs.
- Increased incidents of nationalism and discrimination create a culture of fear for international students.
- Canada, Australia, and the UK have greatly curtailed visas for international students. This could create a great opportunity for US colleges and universities to recruit from China and India. Or the US may be next to curtail visas.



*“In this new environment, higher-ed institutions that are less in love with tradition and more in love with their students, will be the ones that thrive.”*

~Michael Sorrell, President, Paul Quinn College  
at the Arizona GSV Virtual Summit, April 2020

# Thank You!

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