



# Strategic Partnership



- 1 Introduction to EAB
- 2 Institutional Success
- 3 Student Success
- 4 Data Management
- 4 Q&A and Next Steps

**We help schools support students from enrollment to graduation and beyond**

> Find and enroll your right-fit students

> Support and graduate more students

> **ROOTED IN RESEARCH**

**8,000+** Peer-tested best practices

**500+** Enrollment innovations tested annually

> **ADVANTAGE OF SCALE**

**2,100+** Institutions served

**4.1 M+** Students supported by our SSMS

> **WE DELIVER RESULTS**

**95%** Of our partners continue with us year after year, reflecting the goals we **achieve together**



> Prepare your institution for the future

# EAB Offerings Support Institutions in Addressing Today's Biggest Challenges

## Institutional Success

Preparing Institutions  
For the Future



Research focused on driving outsized gains in school strategic and operational performance

~1,100  
Institutions

8,000+  
Peer-tested best  
practices

## Student Success

Supporting and Graduating  
More Students



Comprehensive technology platforms aimed at increasing student retention and streamlining operations

~1,100  
Institutions

9.5M+  
Students supported by  
our SSMS

## Data Management

Unify and Organize  
Data Across Campus



Vendor agnostic data management to support data governance, integrations, and analytics

~150+  
Institutions

90+  
Unique system  
integrations

Serving **2,100+** institutions across North America, UK, Europe and beyond



## Partner-First Strategy

Key attributes:

- Coordinated point of contact across entire EAB portfolio and services
- Solutions aligned to meet the specific institutional priorities of the Leadership Team
- Embedded in your strategy across campus



**Dustin Ott**

Senior Director, Partner Development

[dott@eab.com](mailto:dott@eab.com)



**Strategy and  
Organization**



**Recruitment and  
Student Onboarding**



**Student  
Success**

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# A Unique Approach to Higher Education Research, Strategy, and Support



## We Have Line of Sight into Every Aspect of Institutional Operations

Our expertise cuts across all terrains—academic strategy, student experience, finance, facilities, fundraising, IT, and more—to support both specific initiatives and overall goals.

### 14+

**years** researching operational, academic, and student challenges



## We Harness a Global Network of Sector Leaders

Our proprietary research model seeks out replicable solutions from institutions around the world, uncovering innovative strategies where you may not have known to look.

### 2,100+

**institutional partners**  
around the world



## We Offer Unmetered Access to Our Research and Advisory Services

Our partnerships provide everyone on your campus unlimited access to research initiatives, expert consultations, implementation tools, and virtual and in-person events, without per-person fees.

### 26,000+

**campus leaders** use EAB research and services in their daily workflows

**95%** of our partner institutions continue to work with us year after year because we provide **extraordinary value.**

# What Makes Our Research Unique

A Relentless Focus on Right Answer and a Bias for Action

How We Support  
Our Partners



## We Are Rooted in Research

The problems we identify and solutions we uncover are always grounded in evidence. We believe in the process of discovery but even more so in the intentional application of well-researched insights.

## We Have the Advantage of Scale

By conducting countless research calls each year and by leveraging the industry's largest data set, we have an unrivaled line of sight into how the external market is evolving and where the benchmark has been set for industry best practice.

## We Deliver Results

Whether you want to increase enrollments, graduate more students, reduce costs, close equity gaps, or become more efficient, we promise to get you where you need to be.

## EAB Research Methodology in Brief

### Literature Review and Expert Interviews

We start with an exhaustive literature review and extensive interviews with university administrators, consultants, and experts to help build a deeper understanding of root cause problems and identify potential new ideas.



### Exhaustive Screening for Best Practice

We conduct interviews with innovative organizations to assess its relevance: Is the practice truly innovative? Is it transferable? Can it demonstrate results? This process winnows the list to practices most likely to yield transformative results.



### Rigorous Analysis and Recommendations

The bulk of our research involves a search for the 'right answer' for our partners. Through root cause analysis and synthesis of all the information at hand, analysts isolate the freshest insights and most original ideas to share with you.

# Foresight Is 2020: Window of Opportunity for Change Already at Risk of Closing

## The Pandemic Proved That Higher Ed Institutions can be Nimble



Rapid, large-scale change



Collaboration and problem-solving across disciplines, departments, and functions



Decisive action despite imperfect or incomplete information



Scaled adoption of new technologies and policies



Unique culture and traditions can transcend physical space

## Why Most Will Revert to What *Was* Instead of Embracing What *Could Be*

- ✘ Widespread exhaustion
- ✘ Trust between faculty and administration eroded
- ✘ Federal stimulus minimizes near-term financial pain
- ✘ Worst case enrollment scenarios avoided

**55%** Of faculty are disengaged or considering leaving higher education

**337K** Faculty and staff jobs lost in first eight months of 2020

# Key Imperatives for Higher Education Institutions to Thrive in the Decade Ahead

## Financial Sustainability

### Revenue Growth

#### Enrollment Strategy

- We have built a **future-oriented strategic enrollment management plan**.
- Our **onboarding process** has been audited and streamlined.
- We **understand our market share** and how projected changes in demand and demographics will impact us.
- We understand the **needs and preferences of current and prospective students** to guide program development, co-curricular experiences, and student services.
- We have built a **robust outcomes marketing** approach.

#### Program & Portfolio Management

- **Faculty support an annual departmental effectiveness assessment** and participate actively in program improvement.
- We direct resources toward **high-growth and high-potential** academic and workforce development programs.
- Program launch, refresh, and sunset decisions are informed by data and **driven by a broad strategic vision**.
- We have a codified approach to **securing and retaining employer partnerships**.

### Fiscal Resilience

#### Administrative and Academic Efficiency

- We have aligned our **instructional capacity** to meet changing student enrollment. We **regularly assess the performance** of each administrative function.
- We continuously seek opportunities to engage in **process improvement**—either through a dedicated central team or rotating taskforce—to improve performance and efficiency.
- We have designed and implemented a mission-aligned **shared services** model.

#### Financial Planning & Budget Models

- Our budget is a **clear reflection of our strategic priorities**.
- Our budget provides **for investment in key drivers of growth**.
- We actively pursue ways to **restructure our business model and cost structure** for sustained, long-term advantage.
- We have sufficient central funding to **seed growth, encourage innovation, and scale the adoption of worthy ideas**.

**Bold, Adaptive Strategy**  
*Set Institutional Direction*

**Campus-Wide Clarity**  
*Energize & Empower Stakeholders*

**Operational Excellence**  
*Ensure Strong Execution*

# Key Imperatives for Higher Education Institutions to Thrive in the Decade Ahead

## Student Experience

### ***Diversity, Equity, Inclusion, & Justice***

#### **Student Equity & Belongingness**

- Students with need receive **holistic and in-time support** to maximize persistence.
- We provide ample and accessible support for students experiencing **basic needs insecurity**, and clearly & regularly communicate instructions on easily accessing that support.
- Every student has several **peer-to-peer support** interactions across their first year, especially to support advising and promote help-seeking behavior.

#### **Institutional DEIJ**

- **We have a plan** that sets clear Diversity, Equity, Inclusion, and Justice goals and outlines **funded initiatives and KPIs** to measure success.
- Our **faculty and campus leadership reflects the student body** and our region on major measures of diversity, and our hiring practices are built to sustain this.
- Campus leaders **use student, faculty, staff, & other stakeholder feedback** to understand strengths and weaknesses related to DEI and implement improvements.

### ***Student Success***

#### **Retention and Completion**

- Advisors proactively **use student data to manage interactions** and use advising to **achieve long-term student goals**.
- Our **guided pathways** approach successfully **increases retention and completion, reduces excess credit accumulation**, and allows for greater **major mobility**.
- We have **audited all academic & administrative policies** to eliminate or amend unnecessary friction and stop-out risk.

#### **Mental Health & Well-Being**

- We take a broad approach to student wellness, inclusive of but **further reaching than mental health**.
- We serve as a **clearinghouse for the support students need**, whether offered on-campus or by other organizations.

#### **Student Outcomes**

- **Experiential learning** is embedded within all programs, including those that are not pre-professional.
- We assess and **award academic credit for competencies and experiences gained prior to enrollment** to promote access and shorten time and cost to degree.

**Bold, Adaptive Strategy**  
*Set Institutional Direction*

**Campus-Wide Clarity**  
*Energize & Empower Stakeholders*

**Operational Excellence**  
*Ensure Strong Execution*

# A Year in the Life of a Strategic Advisory Services Partner



## Underlying Support from Your Strategic Leader

*A Dedicated Partner for Matching EAB Capabilities with Institutional Priorities*



# The Enrollment Opportunity on Our Doorstep

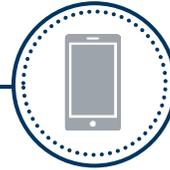
Capturing the 56 Percent of Students We Currently Lose During Onboarding



**Enrollment Pain Point Audit**



Strategic Enrollment Management Plan Roadmap



Web & Mobile Audit



Enrollment Scenario Explorer

**Custom evaluation of your enrollment and onboarding process includes quick wins, proven practices, and researcher support.**

## EAB Guidance & Support at Every Step



**Audit** your enrollment process with EAB and receive an in-depth customized report detailing our findings



**Engage** an EAB researcher in a deep-dive follow-up conversation on your enrollment pain points



**Implement** support and best practice recommendations using EAB-provided materials and tools

## Erase the Primary Obstacles Impeding New Students from Self-Service

- ✓ **Minimize countless transfers** between departments to answer inquiries
- ✓ **Replace generic information with specific guidance** for students with diverse needs
- ✓ **Remove confusing terminology** and use everyday language to simplify the intake process for students unfamiliar with higher ed jargon
- ✓ **Reduce unexplained delays** that slow movement from step to step

# Aligning Portfolio Management with Institutional Priorities



**Academic Vital Signs Workshop**



**Market Smart Program Development Tools**



**Employer Partnerships Campus Intensive**

EAB facilitated workshop helps guides your senior team to **translate broad institutional priorities into clear, actionable goals for departments** in order to motivate improvement.

**Academic Vital Signs**  
Aligning Departmental Evaluation with Institutional Priorities

**Who Should Read**  
Provosts  
Academic Affairs Leaders  
Deans

**Aligning Departmental Evaluation with Institutional Goals**  
The faculty leader and department chair in academic departments make many decisions and strategic choices that have a significant impact on institutional success. The role and goals of the department chair are critical to the success of the institution. The role and goals of the department chair are critical to the success of the institution. The role and goals of the department chair are critical to the success of the institution.

**Cost Efficiency**  
An essential building block for institutional success, cost efficiency is a key metric for evaluating departmental performance. This report provides a comprehensive overview of the various factors that influence cost efficiency and offers practical strategies for improving it.

**Enrollment Growth**  
As institutions become more selective, enrollment growth has become a critical focus for academic departments. This report explores the various factors that influence enrollment growth and offers practical strategies for improving it.

**Student Outcomes**  
Departments and their faculty must report on student outcomes and the quality of the learning experience. This report provides a comprehensive overview of the various factors that influence student outcomes and offers practical strategies for improving it.

**Scholarship**  
To advance scholarship and discovery, departments must provide a supportive environment for their faculty. This report explores the various factors that influence scholarship and offers practical strategies for improving it.

**DEI**  
To make progress on faculty diversity and inclusion, departments must provide a supportive environment for their faculty. This report explores the various factors that influence DEI and offers practical strategies for improving it.

**Faculty Diversity & Inclusion**  
To make progress on faculty diversity and inclusion, departments must provide a supportive environment for their faculty. This report explores the various factors that influence faculty diversity and inclusion and offers practical strategies for improving it.

**Six Principles of Departmental Evaluation**

1. Conduct an external strategic review for each department.
2. Review the self-reporting burden of each department to identify opportunities for streamlining.
3. Use departmental data to inform the evaluation process.
4. Assess the department's performance against its goals.
5. Use departmental performance data to inform the evaluation process.
6. Select key performance indicators to monitor departmental performance.

**Three Ways to Use This Resource**

- Develop dashboards for monitoring departmental performance
- Redesign your academic program review process
- Engage academic departments in advancing strategic goals

EAB Academic Affairs Forum

✓ **Craft level-appropriate goals** for academic departments that align with institutional priorities



Cost Efficiency Student Outcomes Enrollment Growth Faculty DEI

✓ **Conduct root cause diagnostics** to identify specific best practice case studies to guide improvement efforts

✓ **Design an annual department evaluation** and planning process that sustains momentum

# Meeting the Efficiency Imperative While Preserving Mission



## Financial Sustainability Collaborative

## Process Improvement Workshop

## Academic Vital Signs Intensive



Addressing Key Drivers of Academic Costs  
*(Currently underway)*

Financial Sustainability

Addressing Key Drivers of Administrative Costs  
*(Launching Winter 2021/22)*



Realizing Academic Efficiencies



Prioritizing Academic Programs



Improving Retention and Persistence



Developing New Programs to Reach New Students



Realizing Gains from Process Improvement



Optimizing Space for the Hybrid Workforce



Managing through Metrics & Dashboards



Designing a Mission-Aligned Shared Services Model

### Financial Sustainability Opportunity-Assessment Curriculum

Facilitated workshops with peer cohorts



One-on-one office hours with EAB experts



Databooks and exercises with key metrics and formulae



- Customized Prioritization Rubric
- Plan of Action and Accountability

# Aligning the Budget Model to Strategic Priorities



## Budget Intensives for Academic & Administrative Audiences



## Process Improvement Workshops

### Budget Model Redesign Brainstorming and Working Session for Admin Leaders:

- Diagnose weaknesses in current budget model
- Identify budget incentives that drive action on institutional strategic goals
- Determine the technical elements regarding cost allocation, revenue distribution, performance funding, and resource sharing

### Financing the Academic Enterprise Workshop for Academic Leaders:

- Understand the role of faculty leaders in institution financial sustainability
- “Get Smart Quick” training for academic leaders on financial pressures driving budget tradeoffs

**EAB**  
Compendium of Budget Model Profiles  
How 30 Institutions Structure Revenue and Cost Allocation

**Get the Budget Model Machine to work for you**  
The 11 Most Important Decision Points to Align Your Budget Model and Strategic Priorities

**The Periodic Table of Budget Model Elements**  
Aligning Resources with Institutional Goals

**Navigating the Model**

**Revenue Allocation**

Category	Code	Description
Revenue	Ug	University Grants
Revenue	Gr	Grants
Revenue	Pm	Private Money
Revenue	Su	State University
Revenue	Xt	Other
Cost	Sa	Salaries
Cost	Ar	Administrative
Cost	Icr	Instructional
Cost	Nc	Non-Campus
Performance	Rf	Research
Performance	Gn	General
Performance	Bs	Business
Strategic	Sb	State Budget
Strategic	Pr	Private
Strategic	Dv	Development
Strategic	If	International
Strategic	Ce	Capital

# Promote Racial Justice and Close Equity gaps with the Right Plan & Accountability



**DEIJ Design Lab**

Systems Thinking  
Workshop for Leadership

360-Degree Student  
Equity Audit

DEIJ Resource  
Center



- 1 **Assessing  
Readiness**
- 2 **Conducting Early  
Stages of Design**
- 3 **Finalizing  
Plan**
- 4 **Implementing  
Plan**

- "How do I start writing my DEIJ plan?"
- "What are common plan mistakes?"
- "Is my DEIJ plan aligned with industry best practice?"
- "What role does my unit play in operationalizing our DEIJ plan?"
- "What are the most important metrics for us to track over time?"

*DEIJ Plan Writing Starter Kit*

*Plan Pitfalls Webinar*

*Expert Plan Review*

*Divisional Goals Cascade Workshop*

*Metrics Selection Workshop*



# Meeting the Part-Time Student Equity Gap Head-On



**Part-Time Student Success Intensive**



**360-Degree Equity Audit**



**DEIJ Design Lab**



**DEIJ Resource Center**



Bring an EAB expert to campus who will challenge assumptions about part-time students and share best practices to help you close the part-time student success gap.



Financially Incentivized Summer Courses



Dual Modality Course Guardrails



Compressed Terms/Mini-Semesters



Targeted Reenrollment Campaigns



Weekend-Optimized Degrees



Staggered Start Dates



Online Success Primer



In-Time Advising Triage

- 1 Host** an EAB researcher for a tailored presentation to your team
- 2 Identify** largest opportunities to close gaps
- 3 Take action** with your team and track progress

# Paving a (Guided) Path to Retention and Completion



**Guided Pathways Intensive**



**Student Success Self-Assessment**



**Faculty Role in Student Success Workshop**

**Bring an EAB Expert to Campus to facilitate an interactive workshop to help you achieve pathways goals with student-centered design.**

## EAB Guidance & Support at Every Step



**Engage** the cabinet, success committee, and academic leadership in a 2-hour session on guided pathways theory and practice.



**Audit** the maturity of pathways reform efforts on campus through an EAB-designed diagnostic exercise.



**Decide** the next pathways for your campus with consensus-building activities.

**Course-Overlap Identification Primer**

**Purpose of the Tool**  
Colleges often struggle to build meta-majors that encourage timely completion while also allowing for exploration. Jackson College uses enrollment information at the course and program levels to identify the most common courses across programs within a meta-major. Using this information, they are able to build common course sequences across programs, which encourage students to explore within a meta-major without accumulating excess credits. Consult this guide to outline the steps needed to identify these overlapping course sequences.

**Identification**

- Identify a meta-major
- Organize each program of study within a meta-major (e.g., associate degrees, certificates)
- Determine the number of students within each program
- Calculate the total number of students within the meta-major
- Determine the percentage of meta-major students within each program

**Organization**

- In an Excel document, separate each unique class within a meta-major in its own row
- List each program of study within a meta-major in its own column, along with its percentage of meta-major students (from data 5)
- For each individual class, mark the corresponding cell in which it is a requirement for that program of study
- Add the percentages of meta-major students for each class to calculate the total percentage of the entire meta-major population for which the individual class is required

**Next Steps: Mapping Programs of Study**

- Following this course mapping identification process, begin mapping by building as many common sequences as possible across programs of study
- Then, search out common programs based on class requirements

**Table 6: Student of Interest**

Program	Students of Interest	Current %
Accounting	100	10%
Business Administration	100	10%
Health Services Administration	100	10%
Human Services	100	10%
Information Systems	100	10%
Liberal Arts	100	10%
Management	100	10%
Marketing	100	10%
Paralegal Studies	100	10%
Public Administration	100	10%
Public Safety	100	10%
Real Estate	100	10%
Small Business Management	100	10%
Supply Chain Management	100	10%
Transportation Management	100	10%
Visual Arts	100	10%

**Table 7: Liberal Arts**

Class	arts.as	arts.as	liberal.arts	liberal.arts
49.000 ENG 10	G	G	G	G
29.200 MATH 101	G	G	G	G
63.200 JACO 8	G	G	G	G
41.800 (Pop 140)	G	G	G	G

**Catalyze pathway goals with sixteen implementation tools, including:**

- Program-Mapping Process Guide
- Jargon-Reduction Audit
- Student Focus Group Guide
- Cost Comparison Calculator
- Course-Overlap Identification Primer
- First-Year Exposure Course Sample Curriculum
- Advisor Training Curriculum Builder

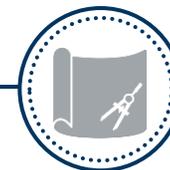
# Addressing Our Students' Basic Needs as a Core Element of Our Work



## Address Food and Housing Insecurity Roadmap



## Faculty Role in Student Success Workshop



## Maximizing Counseling Center Operations Efficiency Roadmap

Leverage EAB support to respond to the ongoing basic needs insecurity affecting students on your campus

## Stepwise Guidance with Research and Tools to Support Your Progress

- ▶ **Maximize connectedness to existing resources on- and off-campus**
- ▶ **Cultivate a campus-wide referral network**
- ▶ **Explore sustainable funding and staffing models**

Catalyze progress with our **implementation resources:**

- Quick guide to measuring basic needs insecurity
- Online resource portal builder
- Evaluation guide for emergency housing options
- Basic needs '411 Folder'
- Referral cards
- Response team brochure
- Funding opportunities compendium
- Job descriptions compendium

The screenshot shows a form titled 'Basic Needs Referral Cards, cont.' with the following sections:

- Key Questions to Answer:**
  - What are the most important resources for students in need to be aware of? These may be on or off campus. Prioritize the top 3-5 resources. Include address, hours, and contact information for each.
    - Food pantry
    - Emergency grant program
    - Emergency housing resources
  - What additional information will you include on the card?  
(Center contact information, website URL, business hours, service offered, etc.)
  - Where should these cards be distributed across campus?
    - Residence life
    - Counseling center
    - International student center
    - Academic advising centers
    - Financial aid office
    - Faculty senate meeting
  - Who (or what office) will be responsible for creating, distributing, and restocking the cards to campus stakeholders?  
(Center Dean of Student Affairs, RTCC/SAFE Team, User manager, etc.)
  - How will you educate campus partners about how and when to use the cards?
    - Present at department meetings
    - Email blasts
    - Informational webpage
- Key Elements:**
  - Marketed across campus to students, faculty, and staff
  - Regularly updated to keep information current and content fresh

# A Better Path for Career and Transfer Outcomes



## Integrating Academic and Career Development Workshop



EAB facilitated workshop guides your senior team to **scale experiential learning and incorporate meaningful career exploration into the curriculum.**

- ▶ *How can we help students make more informed choices early in their academic careers?*
- ▶ *How can we help students articulate what they've learned (and what they can do)?*
- ▶ *How can we reach students with fewer resources and less capacity for risk?*
- ▶ *How can we extend skill development opportunities beyond pre-professional majors?*



## Student-Centered Design Tactic Briefs



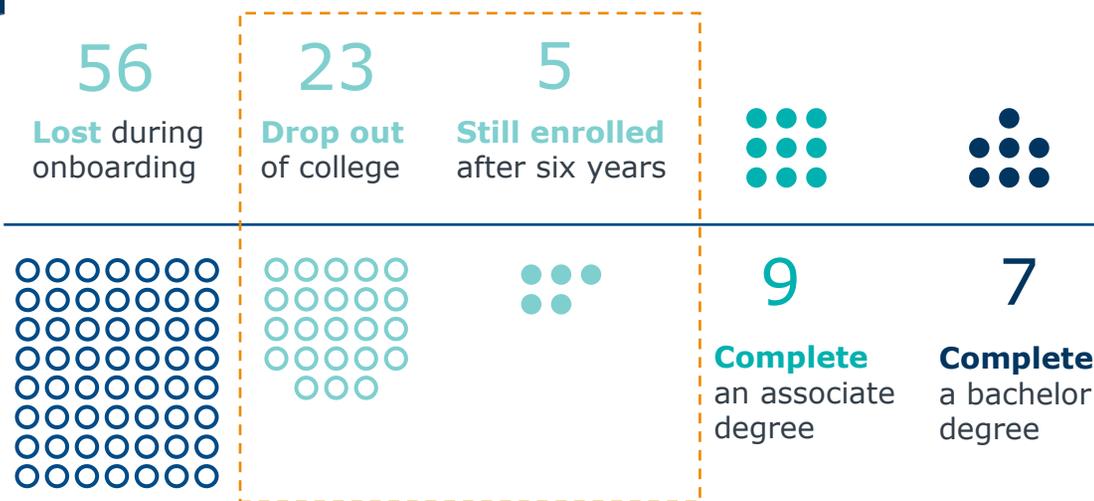
Maximize outcomes by using EAB's best practices to ensure advisors are centering conversations around **student goals rather than institutional priorities.**

- ✓ *Ensure students receive **accurate, actionable information** directing them to a program of study that meets their needs and interests*
- ✓ *Center advisor conversations around **student goals rather than institutional priorities***
- ✓ ***Embed career experiences** into a first-year pathway exposure course*
- ✓ *"Internally recruit" high-achieving students to **prevent stop-outs***

# Student Success Remains a Critical But Complex Priority to Address

## 10,000 Reasons Why A Student Does Not Persist

For Every **100 Students** Who Apply to a Two-Year School...



## Most Colleges Are Underprepared to Support The "Whole Student"

- ▶ Academic Challenges
- ▶ Paying for College
- ▶ Fit and Belonging
- ▶ Mental Health
- ▶ Work/School Balance
- ▶ Family Obligations

## Pandemic Spotlights Intersection of Barriers to Success Beyond Academic

### Increasing Financial Need

**41%** Of students listed paying for tuition and related expenses as a top stressor  
(+11 points for Latino students)

### Growing Concerns Over Student Wellbeing

- #1** Emotional well-being reported as the highest-ranking challenge for students Fall 2020
- 2x** College students with mental health concerns are twice as likely to drop out

### Self-Inflicted Barriers Caused by Complex College Structures

- Skipping Enrollment Steps
- Indecision Choosing a Major
- Delayed Introductory Course Sequence
- Locked Out of Critical Courses

Source: Shapiro D, et al., "Completing College: A National View of Student Attainment Rates – Fall 2010 Cohort (Signature Report No. 12)" National Student Clearinghouse Research Center (2016); EAB interviews and analysis; Statda College Pulse Survey Sept 10-25: current college student enrolled at four-year institutions n=3,389; <https://cci.stradaeducation.org/public-viewpoint/#>

# Advancing Student Success and Equity Goals

This self-assessment is designed to help college and university leaders identify key opportunities for improvement within their student success strategy. Complete each category, rating the level of performance your college has achieved. After completing this exercise, your EAB team will discuss research, diagnostic tools, and technology to help you make progress against your outstanding goals.

GRADING SCALE

- 1 = We need a lot of additional support to improve performance
- 2 = We are behind and need additional support to improve
- 3 = We have moderate room to improve our performance
- 4 = We have minimal room to improve our performance
- N/A = Not applicable

Eliminating Registration and Financial Barriers		Supporting Students with Tech-Enabled Advising		Building Belonging and Academic Confidence		Reducing the Number of Unproductive Credits		Enhancing the Value of the Curriculum																
<b>Reform Administrative Processes and Policies</b> Student-facing registration and hold policies do not unduly and unnecessarily prevent students from enrolling and returning. Academic leaders have aligned policies that nudge students to make better choices, and they regularly review policies to discover hidden policy roadblocks.		<b>Proactively Manage Advising Caseloads</b> Advisors have defined caseloads and proactively use student data to prioritize, generate, and manage interventions. They closely track academic progress and next-term registration, reaching out to resolve persistence barriers.		<b>Enroll Students in Pre-college Academic Preparation Programs</b> Every student participates in a pre-college or first-term program in addition to orientation, that helps them understand the rigors of college-level work, introduces them to academic support services, and promotes academic self-efficacy.		<b>Redesign High-DFWI Milestone Course</b> Faculty have identified courses with the highest DFWI rates, especially introductory and developmental, and redesigned them to improve grades, student learning and success in future courses. Redesigns may include active learning, supplemental instruction, flexible modalities, etc.		<b>Embed Experiential Learning in the Curriculum</b> Faculty have embedded experiential learning such as apprenticeships, internships and co-ops into courses within each program, removed barriers for under-resourced students and given regular opportunities to reflect on and apply the skills they have gained.																
LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE																
1	2	3	4	N/A	1	2	3	4	N/A	1	2	3	4	N/A	1	2	3	4	N/A	1	2	3	4	N/A
<b>Create an Emergency Microgrant Program</b> Students with need receive supplemental grants and scholarships that strategically support persistence. For example, students with small balances, temporary challenges, or nearly enough credits to graduate receive priority.		<b>Coordinate Student Support Networks</b> Student-facing support offices (advising, tutoring, career, etc.) are networked together with technology and processes to responsibly share data on students and collaborate on cases.		<b>Foster Social Support and Personal Belongingness</b> Regardless of background, students feel represented and welcome because of the support and cultural programs on campus. From recruitment to graduation, opportunities are integrated to connect students to support advising and promote help-seeking behavior.		<b>Streamline Prerequisite and Program Requirement Pathways</b> Faculty have streamlined curricula to reduce non-productive credits, increase engagement, and facilitate student mobility among majors. Examples include re-alignment of math requirements to programs, stats-based remediation, and caps on maximum credits required.		<b>Sequence Career Guidance and Exploration in Parallel to Courses</b> All students have opportunities in their curriculum for career development. These co-curricular activities are accessible to all students and mapped alongside academic coursework. They may include employer shadowing, integrated certifications or concentrations, or industry credentials.																
LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE																
1	2	3	4	N/A	1	2	3	4	N/A	1	2	3	4	N/A	1	2	3	4	N/A	1	2	3	4	N/A
<b>Simplify Early Academic Planning</b> Students are encouraged to conduct career-exploration. Meta-majors, degree maps, and pre-made schedule templates simplify onboarding and scheduling. Technology helps students and institutions build schedules that fit working adult lives. Students are urged to complete 30 credits a year if possible.		<b>Formalize Student Success Accountability and Leadership</b> Student success staff and leadership have clear performance indicators that measure their contributions to institutional priorities. Advisors have regular professional development opportunities and career ladders aligned with their contributions to key performance indicators.		<b>Assess Campus Climate and Prepare for Flashpoints</b> Campus leaders use student feedback to understand strengths and weaknesses related to DEI and implement improvements. Policies prevent and address instances of bias. Leadership has assigned dedicated staff, task forces, and resources to respond in the event flashpoint incidents occur.		<b>Encourage Pedagogical Development of Instructors</b> Faculty receive regular professional development related to teaching and learning, starting with new faculty onboarding. The institution has designed multi-faceted evaluations of teaching quality and student learning outcomes that encourage continuous improvement.		<i>Of the topics listed, our top priorities for the next year are:</i> 1. _____ 2. _____ 3. _____																
LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE		LEVEL OF PERFORMANCE																
1	2	3	4	N/A	1	2	3	4	N/A	1	2	3	4	N/A										

**Hardwiring Student Persistence** **Maximizing Return on Education for All Students**

# Proposed Institutional Success Partnership Terms



First Year Price	Annual Increase
\$22,500	3.5%

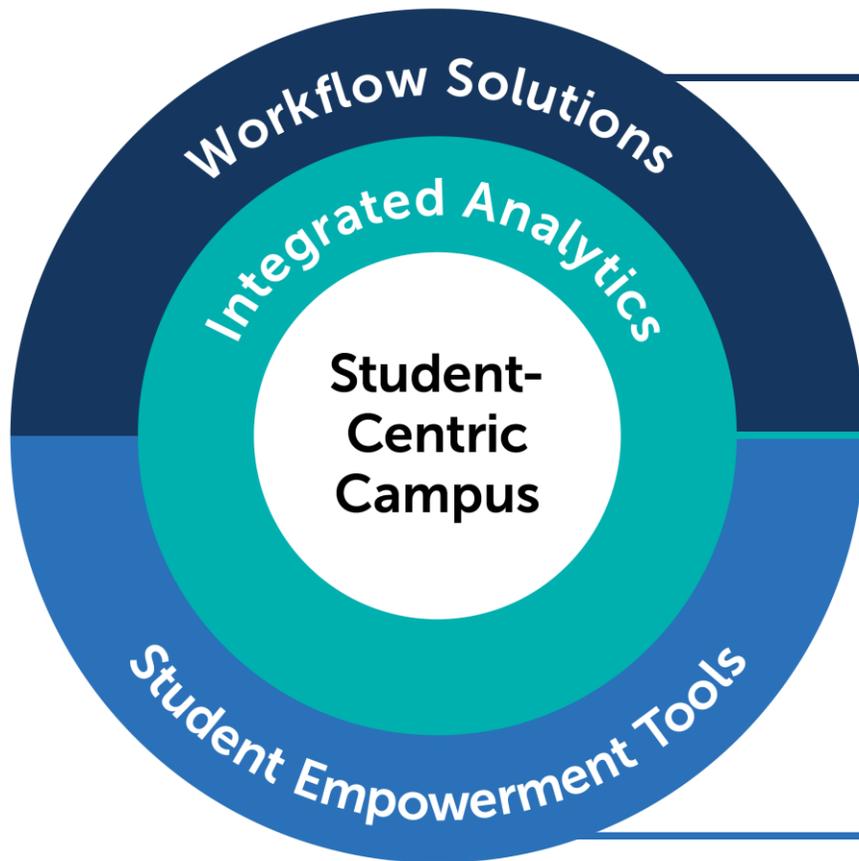
*\*Contingent on a Three-Year Commitment*

- 1 Introduction to EAB
- 2 Institutional Success
- 3 Student Success
- 4 Data Management
- 4 Q&A and Next Steps

# Inside Navigate

---

**Navigate** is EAB's Student Success Management System, the first enterprise-level technology for student success in higher education. Navigate brings together students, administrators, advisors, faculty, and other staff in a collaborative network to holistically support students across the college journey.



## Workflow Solutions

---

Focus and scale interventions, support advisors and other staff in their day-to-day work, and create a truly **coordinated network** for student success

## Integrated Analytics

---

Understand which interventions are working and how to best **adjust your strategy** to support your school's needs

## Student Empowerment Tools

---

Build **belonging** and a deeper sense of purpose at school with Navigate's mobile app and other digital tools

# Overview: Build Your Navigate Platform

## Core Platform

*Navigate's essential core features:*

### Workflow Solutions

- ✓ Smart student profile
- ✓ Advanced search
- ✓ Campaign management
- ✓ Appointment scheduling
- ✓ Student messaging
- ✓ Coordinated Care Network and early alerts

### Student Empowerment Tools

- ✓ Student success network
- ✓ Campus resources
- ✓ View class schedule
- ✓ Content administration tool

### Integrated Analytics

- ✓ Population health analytics
- ✓ Workflow analytics
- ✓ Effectiveness analytics
- ✓ LMS managed integration (\$)



## Student Engagement

### Milestone Guidance

*The entire core platform, plus:*

### Workflow Solutions

- ✓ Student milestone integrations

### Student Empowerment Tools

- ✓ Student holds
- ✓ Study buddies
- ✓ Student surveys
- ✓ Pivotal moments path
- ✓ Care unit communication
- ✓ Student communities
- ✓ Financial planner

### Integrated Analytics

- ✓ Student milestone analytics



### Academic Planning

*The entire core platform and Milestone Guidance, plus:*

### Workflow Solutions

- ✓ Academic plan integrations

### Student Empowerment Tools

- ✓ Digital templates and academic planner
- ✓ Shared workspace
- ✓ Best-fit scheduling and one-click registration
- ✓ Degree rule emulation (\$)

### Integrated Analytics

- ✓ Academic planning analytics



## Historical and Predictive Analytics

*The entire core platform, plus:*

### Integrated Analytics

- ✓ Historical trend analytics
- ✓ Student success predictive model

# Core Platform

All the Tools You Need to Support Student Success on Campus

## WORKFLOW SOLUTIONS

**Smart Student Profile and Advanced Search**

Scalable tools allow for elevated advising conversations and targeted interventions

**Smart Student Profile and Advanced Search**

Scalable tools allow for elevated advising conversations and targeted interventions

Overview | Success Progress | History | Class Info | Academic Plan | Major Explorer | Path | More

Course Grade D/F: 2 | Repeated Courses: 1 | Withdrawn Courses: 0 | Missed Success Markers: 3

Cumulative GPA: 2.85 | Total Credits Earned: 39.00 | Credit Completion Ratio: 85% | Predicted Risk: High

Biology | College of Arts & Science | STUDENT ID: JIH129047 | CLASSIFICATION: Second Year

Staff Alerts | Take Action | Active Campaigns

## Campaigns, Appointments, and Multi-Modal Messaging

Robust tools help advisors and staff proactively plan, execute, and track ongoing advising efforts

**Active Campaigns**

Appointment Campaigns | Progress Report Campaigns

STATS

Appointments for Next Term (01/18) | Quick Stats

- Appts. Made (60%)
- Attend. Rate (73%)
- Reports Created (81%)

Red Success Marker (01/18) | Quick Stats

- Appts. Made (55%)
- Attend. Rate (73%)
- Reports Created (81%)

Blue - Credit Completion (01/18) | Quick Stats

- Appts. Made (43%)
- Attend. Rate (22%)
- Reports Created (10%)

Appts. Made (72%)

**Coordinated Care Network and Early Alerts**

Case management tools and shared documentation help stakeholders coordinate to deliver better support

MANAGE CASE

Laura Gonzales

Reason(s): Financial Aid | Case Owner: Jack Whitten

Case Activity

- 01/07 Jack Whitten opened case
- Jack Whitten added comment: Laura's family is having some trouble speak with a counselor to discuss college.
- 01/15 Jack Whitten assigned case to Financial Aid
- Financial Aid added comment: Emergency funding issued
- Financial Aid Office closed case

ISSUE AN ALERT

Student: Laura Gonzales

Please select the reason you believe this student needs assistance.

Is this alert associated with a specific class?

Please select one

- Failed Midterms
- Financial Aid
- Emotional Issues
- Excessive Absences
- Medical Issues
- Needs Tutoring
- Positive Alert

Please enter a comment.

Cancel | Submit

## STUDENT EMPOWERMENT TOOLS

### Student Success Network, Schedule, and Resources

Essential tools and actionable information, right at students' fingertips

The content administration tool allows approved staff to edit the content students see

Resources

People | Places

Advisors

- JW Whitten, Jack | Academic Advisor
- ADV Advising Center | College Park Campus

Faculty

- JM James, Natasha | Career Counselor
- NT Tyson, Professor Neil | Instructor
- JM Miller, Professor Jessica | Instructor
- NT Tyson, Professor Neil | Instructor

Get Support

Any questions? Schedule some time to meet with someone who can help.

## INTEGRATED ANALYTICS

### Population Health, Workflow and Effectiveness Analytics

Dashboards let administrators aggregate data on student activity, and allow them to assess the impact of and identify further opportunities for outreach and interventions

Total Enrolled in Current Term: 2,450 | Avg. Cum. GPA: 3.10 | Avg. Credit Completion: 92%

Risk Profile: 643 Low, 828 Moderate, 1,004 High

Academic Performance

GPA Metrics

Cumulative GPA	# Students
< 2.0	119
2.0-2.2	84
2.2-2.4	124
2.4-2.6	167
2.6-2.8	207
2.8-3.0	179
3.0-3.2	229
3.2-3.4	247
3.4-3.6	296
3.6-3.8	250
3.8-4.0	177
4+ 4.0	181

Appointment Attendance

Location: All majors | Date Range: January 2018 - July 2018

Reason: All Advising | Report Filed: Yes

Appointments and Students

Appointments Created	Distinct Students
9,587	2,506

The total counts of appointments and distinct students are displayed regardless of attendances.

Attendance Categories

Scheduled	Drop-In	No-Show	Cancelled
9,587	2,506	1,495	205

**\$29.4M**

Total return on investment from Navigate reenrollment campaigns at CSU Fullerton

# Student Engagement: Milestone Guidance

Dynamic Mobile and Desktop Platform Provides Tailored Support to Help Students Succeed

## STUDENT EMPOWERMENT TOOLS

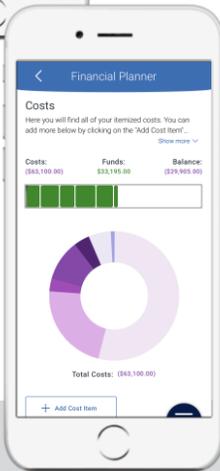
### Pivotal Moments Path

Help students navigate key college milestones with timely, customized support



### Financial Planner

Help students plan and budget for their college expenses

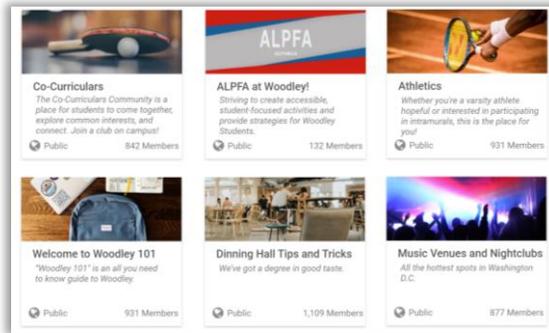


92%

Advising appointment attendance following Navigate nudging campaigns  
ARAPAHOE COMMUNITY COLLEGE

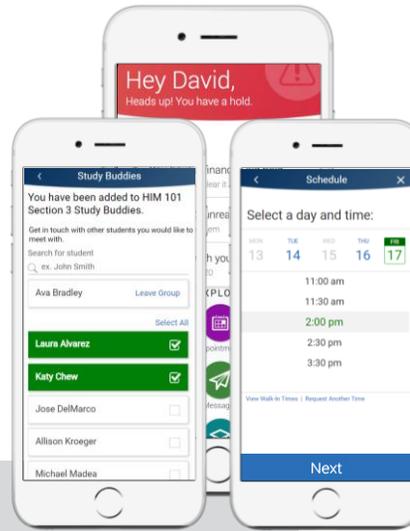
### Student Communities

Foster engagement and allow students to connect with peers through robust virtual communities



### Term-to-Term Tools

Self-service tools equip students to take proactive action and resolve issues independently: hold resolution, study buddies, appointment scheduling, and more

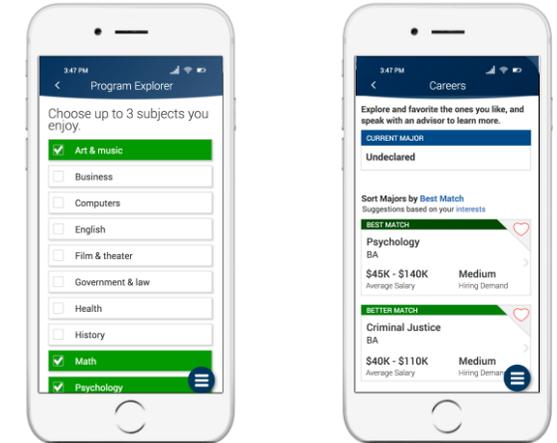


94%

Portion of freshmen who downloaded the Navigate app in first-year seminars  
ROBERT MORRIS UNIVERSITY

### Student Surveys

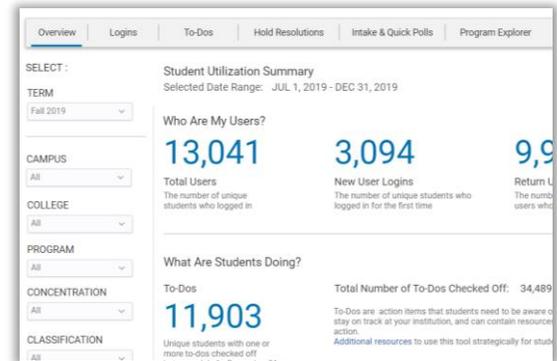
Interactive surveys and polls for new student intake, exploring majors, sharing needs and interests, and more



## INTEGRATED ANALYTICS

### Student Milestone Analytics

Track student behavior to measure engagement and inform interventions



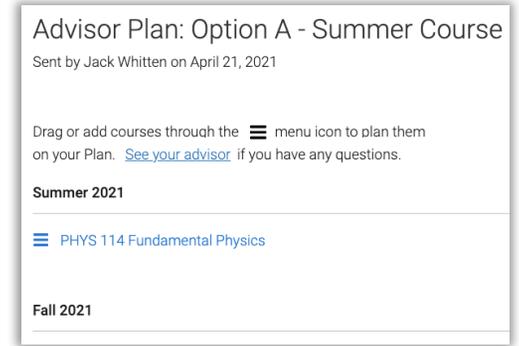
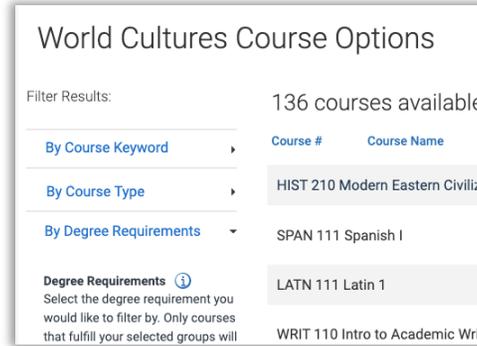
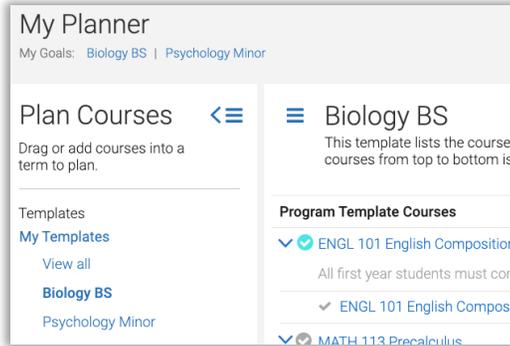
# Student Engagement: Academic Planning

Collaborative Academic Plan Building, Scheduling, and Registration Within a Single Platform

## STUDENT EMPOWERMENT TOOLS

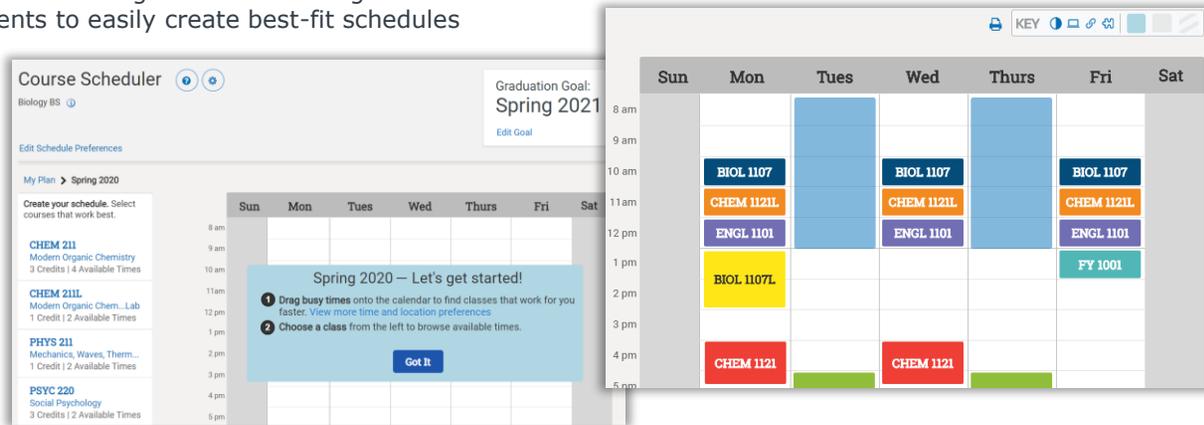
### Planning Templates, Smart Search and Collaboration

Planning tools enable intentional, long-term course planning and on-time graduation



### Course Scheduling and Registration

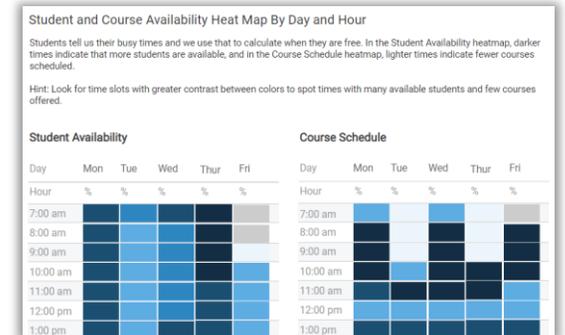
Quick scheduling and one-click registration allow students to easily create best-fit schedules



## INTEGRATED ANALYTICS

### Academic Planning Analytics

Analyze course and scheduling preferences to improve academic capacity planning



**\$1.39M+**

Estimated preserved tuition revenue from reenrolled students

YORK TECHNICAL COLLEGE

**35** percentage-point

Improvement in preregistration rate in one year

ELIZABETH CITY STATE UNIVERSITY

# Historical and Predictive Analytics

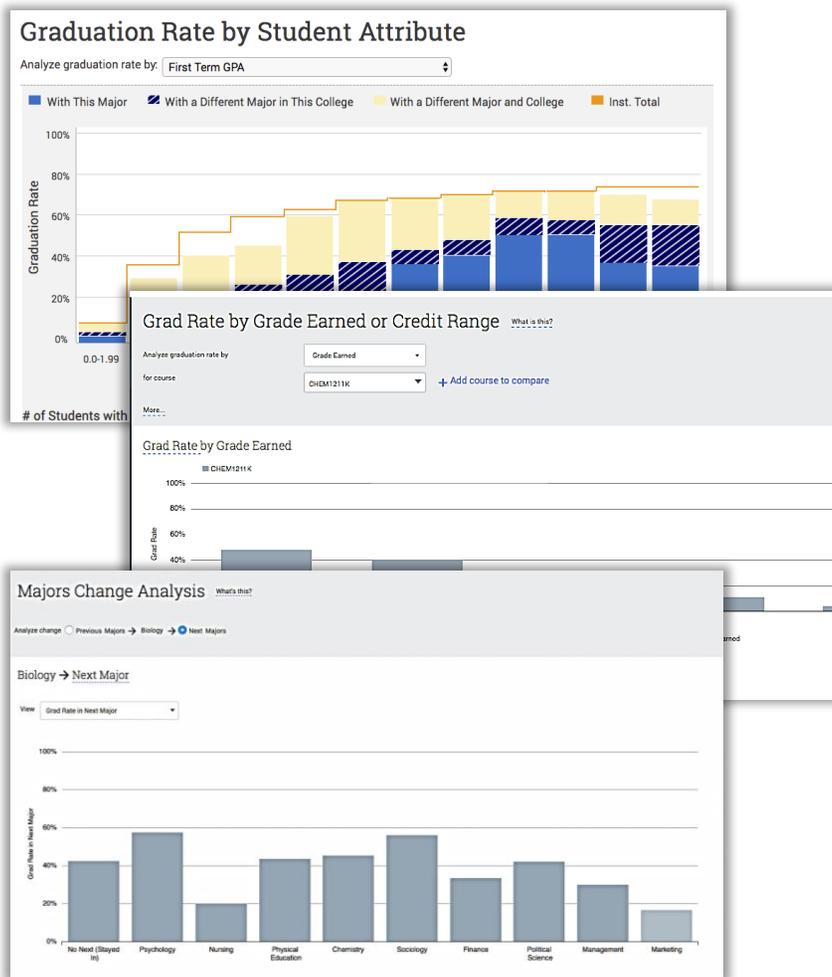
Research-Based and User-Driven Analytics Help Leaders Translate Insights into Action

## INTEGRATED ANALYTICS

### Historical Trend Analytics

Reports analyzing historical data support institution-level and program-level decision-making

*Note: This feature is only available for four-year institutions*



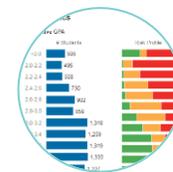
### Student Success Predictive Model

Core predictive model powers the system, identifying and prioritizing student interventions

#### Data Inputs

- Student demographics (e.g., age, race/ethnicity)
- High school outcomes and information (e.g., HS name and location, HS GPA, SAT)
- Academic records (e.g., grades, GPA, DFW counts)
- Student characteristics (e.g., student type, in-state/out-of-state/international, veteran)
- Transfer records (e.g., prior coursework, grades)
- Course and credit registration (e.g., courses, attempted credit load, credit completion ratio)
- Derived variables (e.g., GPA trend, estimated skills, major-skills alignment)

#### Data Outputs: Where the Platform Displays Predictive Influences



**8 fewer**

Avg. excess credits at graduation after retargeting resources

GEORGIA STATE UNIVERSITY

**27+**

Courses redesigned following analysis of "barrier" courses

MIDDLE TENNESSEE STATE UNIVERSITY

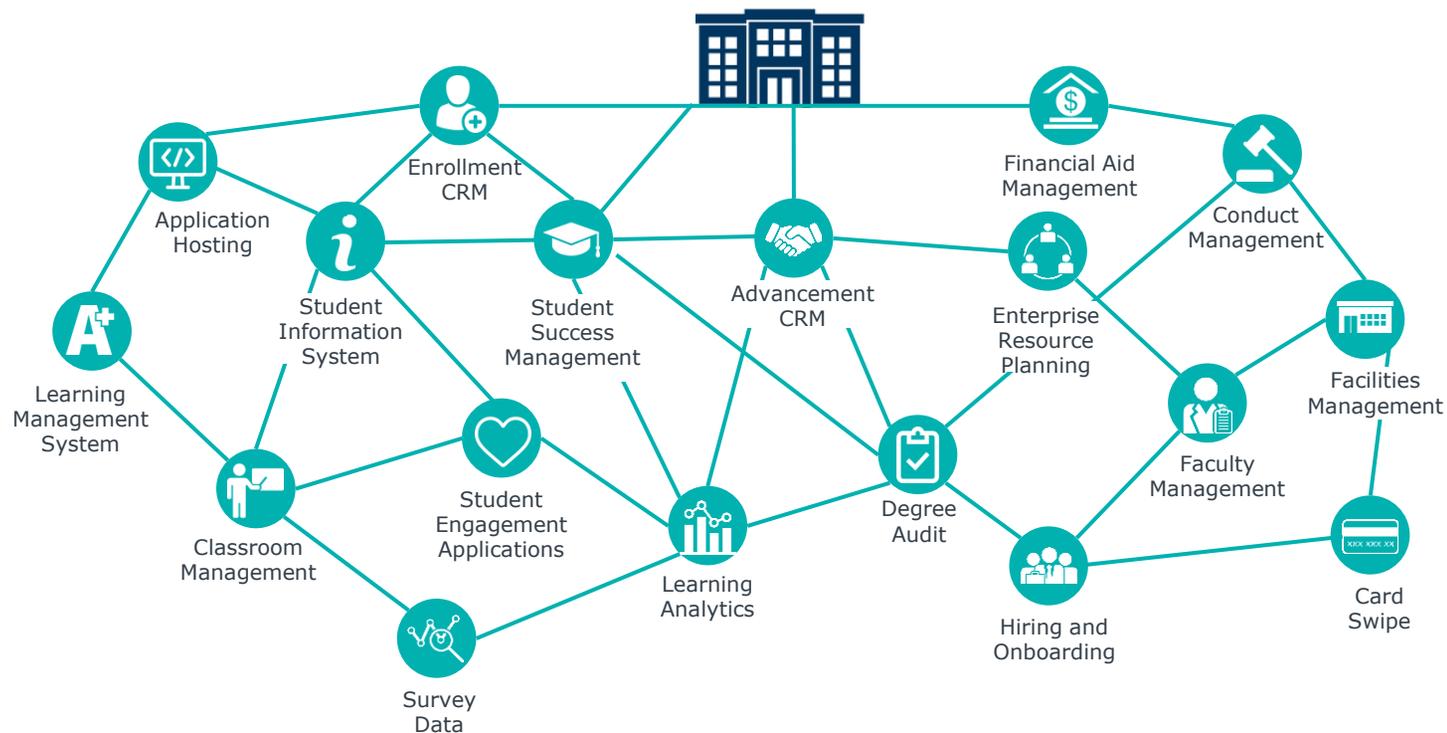
# Proposed Student Success Partnership Terms



	<b>CORE</b>	<b>CORE + Milestone Guidance + Predictive Analytics</b>	<b>Full Student Success Management System</b>
<b>One-Time Platform Configuration</b>	\$15,000	\$15,500	\$20,000
<b>Annual Fee</b>	\$29,500	\$44,500	\$60,000

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# A Challenging Environment for Data Initiatives



## 1 Constant Integrations Lead to Architecture by Accident

*"We can only do the minimum needed to say, "it's integrated!" so we can move on to the next."*

## 2 Competing Narratives Resulting from Siloed Data

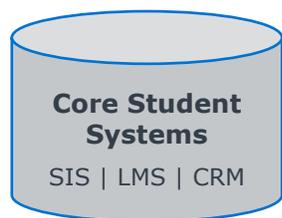
*"There are five different numbers for freshman enrollment depending on who you ask."*

## 3 Institutions Are Data Rich, But Insight Poor

*"Our President has a question today, but it will be 3-4 weeks until we can provide the answer."*

## A Data Management Platform to Centrally Organize Student Information

### Comprehensive Data Coverage



### 360-Degree View of the Student

EAB's **Quad higher education data model** organizes campus-wide information by business-use data definitions that are system and vendor agnostic



- Contact info
- High school GPA
- Housing



- Degree
- Registered credits
- Term level



- Accounts receivable
- Financial aid
- Alumni giving



- Student surveys
- Privacy preferences
- Wealth indicators

### One-Stop Source of Campus-Wide Data



User-friendly interface for data model access and export building



Direct connection to reporting, analytics, and BI environments



Customized integrations between existing student systems and datasets

# Powering Your Unique Data Strategy with Edify

A Higher Ed Specific, Vendor Agnostic, Highly Customizable Solution

## Accelerators

A **library of mission-specific projects** that deliver immediate value on your most pressing issues



## Enabled by:

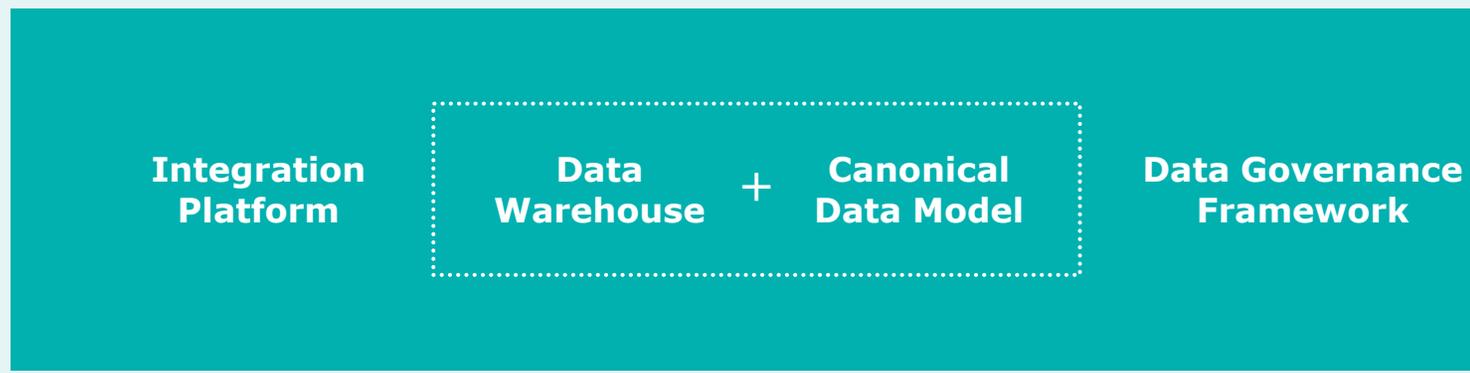
## Services

Expert support and services adapted to your institution's needs



## Technology

A **data platform** that centralizes and unlocks your campus data



# Enrollment Pressures Demand a New Approach

Data-Enabled Strategic Enrollment Management for the Digital Age

**Enrollment declines compounded by the COVID-19 pandemic**

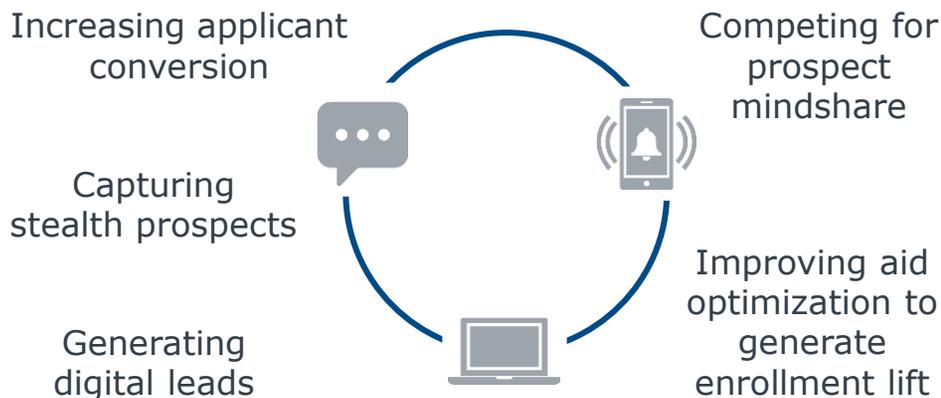
14%

Projected decline in the 18-year-old population between 2026 and 2029

7%

Of college applicants enrolled nowhere due to COVID-19

**New landscape demands tech-enabled prospecting, recruitment, and retention**



## Strategic Enrollment Management Accelerator

?

Answer these key questions:

- How can I anticipate the impact of shifts in our enrolled student population?
- Where should we prioritize our limited time and enrollment dollars to maximize yield?
- Are we offering equitable and sufficient financial aid packages?

Source: SHEEO "State Higher Education Finance: FY 2015"; Grawe, Demographics and the Demand for Higher Education, 2018.

# Strategic Enrollment Management

▶▶▶ Accelerator



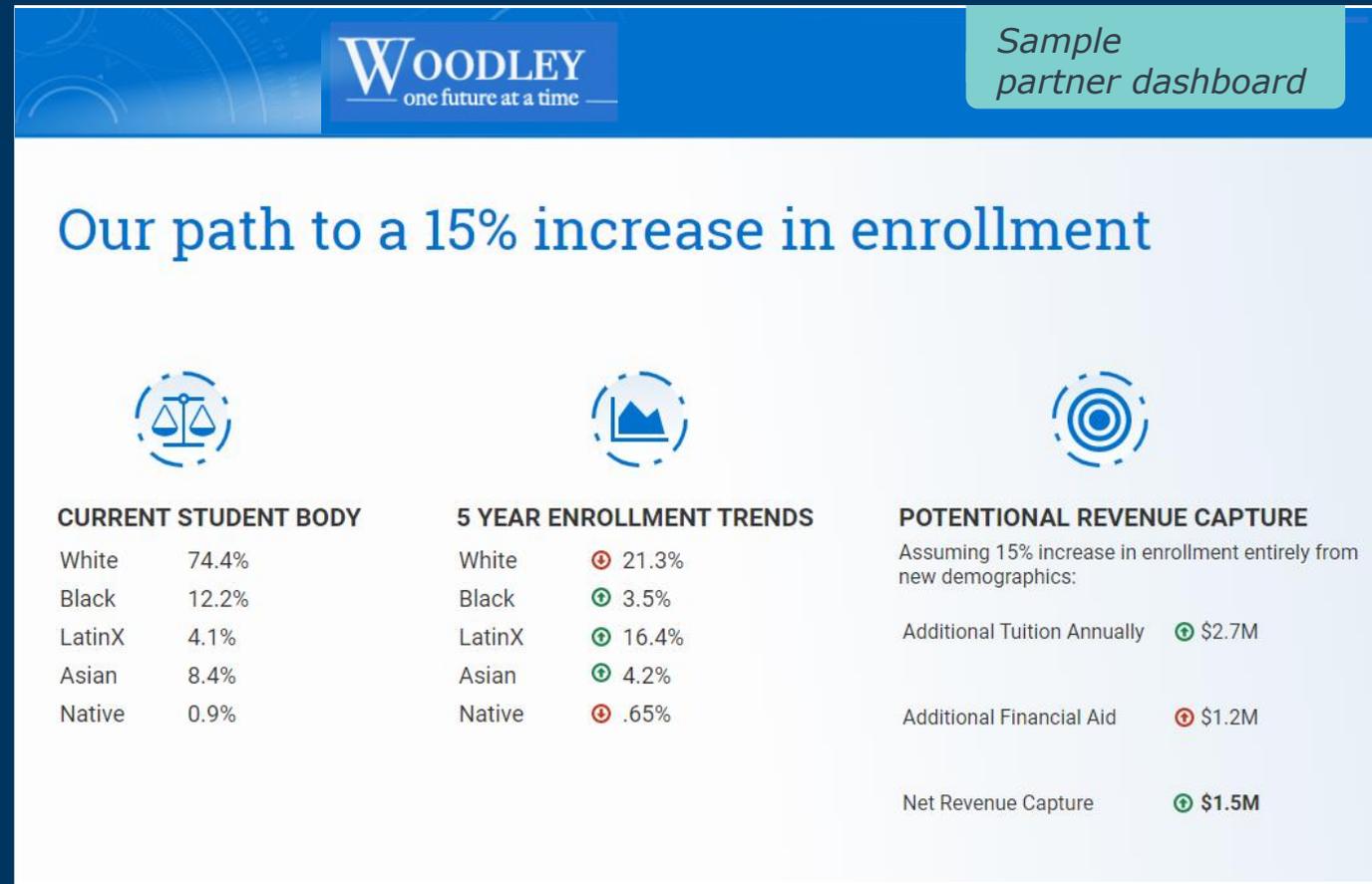
## Potential Data Sources

- Student information system
- Enrollment CRM
- Learning management system
- Website activity data



## Intended Users

- President
- VP of Enrollment Management
- Directors of Admission
- Marketing and communications staff

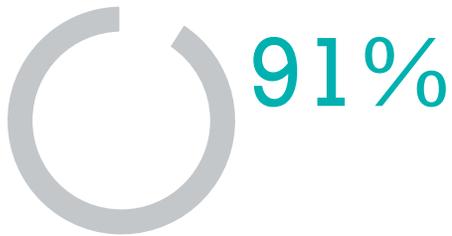


# Connect the Dots to Improve Donor Engagement

Integrate Student Activity and Other Data to Support Advancement

## Institutions are relying on advancement...

*Percentage of presidents likely to take each action to manage current budget shortfalls*



Cultivate new donor bases



Start or expand a capital campaign

## ...but lack the infrastructure to effectively engage today's donors



*Donor preferences:*

- Personalized communication
- Online giving and engagement



*Advancement frustrations:*

- No one technology meets all needs
- Point solutions do not easily "talk" to each other

## Advancement Analytics Accelerator



Answer these key questions:

- Which experiences at our institution have the greatest impact on giving?
- How should we prioritize donors during our next campaign?
- How can we use data to improve alumni engagement and increase giving?
- How can we report back to donors on the scholarships and other initiatives they've endowed?

Source: EAB analysis of Voluntary Support of Education Survey dataset, EAB Advancement Forum insights and analysis.

# Advancement Analytics

▶▶▶ Accelerator



## Potential Data Sources

- Student information system
- Advancement CRM
- Events and ticketing
- Student activity tracking



## Intended Users

- VP of Advancement
- Major Gifts Officers
- President

Analyze KPIs

Sample partner dashboard

Faculty\_Student Assignments

Go to EDH Library

Select Filters

LAST ACTIVE TERM  
Custom Range

COLLEGE  
All

MAJOR  
All

GRADUATION STATUS  
Alumni

PROFESSOR NAME  
All

Students

Student Name	Last Active Term	College	Major	Graduation Status	Professor Assignments
Ava Aaron	Spring 1991	College of Business	Accounting	Alumni	Jason Francis Finella Whitaker Calista Grier Veronica Wayne Atonia Banister <a href="#">See All</a>
Oria Abel	Spring 2000	College of Business	Advertising	Alumni	Brandee Scholz Carbrey Woods Guy Triggs Gorgi Petrov Calista Grier <a href="#">See All</a>
Iris Abel	Spring 1992	College of Arts & Science	Biology	Alumni	Lars Ryland Leon Leroux Tomoko Richards Dean Argyris Dror Davis <a href="#">See All</a>
Cara Abraham	Spring 1996	College of Creative Arts	Acting	Alumni	Su-Jin George Allison Emerald Dawn Tsukuda Todor Samuel Kathryn Pecora <a href="#">See All</a>
Elias Adamoli	Spring 1993	College of Arts & Science	Agricultural Studies	Alumni	Lars Ryland Farrah Aftyn Vera Terzi John Mein Rick McPhee <a href="#">See All</a>
Elena Accardo	Spring 1994	College of Business	Economics	Alumni	Veronica Wayne Emma Johns <a href="#">See All</a>



# Data-Informed Program Management

## Regular Review Cadence Supports Program Health and Strategic Alignment

### Annual program review helps make the most of scarce resources...

70%

Of institutions expect new funds for academic programs to come from reallocation rather than new revenue

#### Benefits of annual review



Lets you intervene while there's still time



Socializes the need for change



Buys time to loosen fixed costs

### ...yet most institutions struggle to implement an effective process



62%

Of provosts need help allocating support to programs<sup>1</sup>



50%

Of provosts need help establishing program review KPIs<sup>1</sup>

### Program Management Accelerator



Answer these key questions:

- Which programs are most popular with current and entering students?
- How are programs under- or over-performing based on market demand?
- Which programs have highest and lowest stop-out rates?
- Which programs have best and worst margin?
- Where should faculty lines be added or removed?

1) n=50 provosts surveyed by EAB in the spring and fall of 2020.

Source: 2018; "2018 Survey of Chief Academic Officers," Inside Higher Ed EAB interviews and analysis.

# Program Management

➤ ➤ ➤ *Accelerator*



## Potential Data Sources

- Student information system
- Human resources ERP
- Finance ERP
- Labor market data
- IPEDS

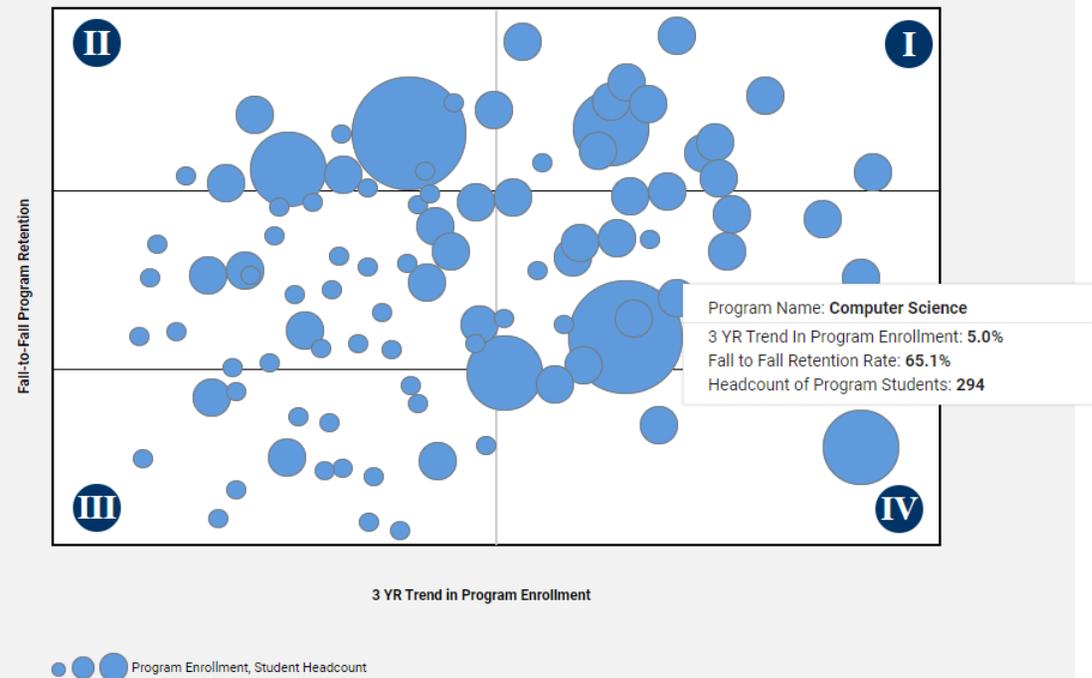


## Intended Users

- Provost
- Deans
- Department chairs
- Faculty

## Portfolio Analysis

This matrix groups programs into four categories based on enrollment growth and percent of students who continue in the program from fall-to-fall. Relevant resources and next steps are recommended for each category:





# Professional Services

## Annual Access to Deep and Diverse EAB Expertise

### Data Governance and Audit Support



Conduct diagnostic workshops to understand current and desired state of governance; informing a recommendation for enacting a strategy that spans people, processes, and technology.

### Strategic Planning



Understand an institutional objective and develop a design and operational plan with discrete tasks to achieve the goal leveraging Edify.

### Business Process Review



Based on institutional need, design a future state business process with owners and tasks – aligned with how Edify can be used to support the process

### Data Science and Analytics



Scope, design, and build a custom data science model using data from Edify to address department / function specific use cases and/or strategic objectives of the institution

### Reporting and Dashboarding



Build and customization of existing BI environment (Tableau, PowerBI, etc.) using data from Edify to meet current reporting needs as well as future business objectives

### Technical Integration Services



Functional and technical components of implementing systems beyond those outlined in Core Implementation – including data intake, data mapping, workflow development, quality assurance / testing, and outbound integration from Edify to target systems.

# Proposed Data Management Partnership Terms



<b>Range</b>	\$75,000 - \$250,000 Average \$155,000

- 1 Introduction to EAB
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