

Program Innovation: Adapting to Today's Demands



Logistics

- Yes! We will be sending a recorded version of this webinar and the slides out to you so you can share with your teams!
- Questions will be taken at the end of the webinar
 - To ask a question, just type it into the Q&A section of the ReadyTalk console
 - If we don't get to all of the questions, we'll follow-up afterwards via email



Introductions

Johanna Trovato
Eduventures Senior Analyst

Johanna brings more than a decade of market research experience specific to higher education to the Eduventures Research Team. Previously, Johanna was a Client Research Analyst, serving as a strategic thought partner for higher education leaders, and Consultant at a higher education research and consulting firm. She is well-versed in quantitative and qualitative research, but also understands the issues higher education leaders are facing across the enrollment lifecycle.

Clint Raine
Client Research Analyst

Clint has been with Eduventures for two years- first as a graduate student research intern while completing his master's in higher education and now as a Client Research Analyst. In this role, he helps scope, conduct and provide analysis on custom program feasibility studies for clients by becoming familiar with their strategic priorities and pain points. Before Eduventures, Clint worked in education policy and as a high school teacher.

What We Will Talk About

- Our Take on Assessing Program Feasibility
- Real Life Examples



Our Take on Assessing Program Feasibility



The Way Many Think About Program Feasibility

High Student Demand + Good Labor Market = Opportunity



Then Why Aren't Some Schools More Successful?

Registered Nursing:

- Bachelor conferrals grew by 32% between 2013 and 2017
- 15% projected job growth between 2017 and 2027
- Most popular major among undergraduate prospects (2019 *Eduventures'* Prospective Student Survey)

Declining Conferrals At:	2013 Bachelor Conferrals	2017 Bachelor Conferrals	2013-2017 Change
Brandman University	18	3	-36%
Monmouth University	4	1	-29%
McMurry University	14	7	-16%
Bluefield State College	16	9	-13%
Spring Hill College	18	13	-8%
Dordt College	27	21	-6%



Context Matters!

- What kind of institution are you?
- What types of students do you attract?
- What is happening in your market?
- How do your competitors talk about their program?
- How do you intend to talk about this program to your prospects?



Smiling Students and a Bright Future

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Undergraduate Admission

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The future is bright at Monsters University



The MU Commercial
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Movie Night
"From Here to Monstrosity"
Thursday at 7pm

[Flash Mob Club](#)

Academic Program Marketing – Some Do it Better...

Home / Registrar / Programs /

Hi there. Let's find a major or degree program that fits you.

- I like to... →
- I want to be a ... →
- I'm searching for ... →
- Browse all programs →
- Online programs →

- help others
- work with technology
- work with hands
- solve problems
- experience new places and cultures
- be outside
- be creative
- entertain others
- crunch numbers
- teach others

The image shows a website interface for finding academic programs. It features a navigation breadcrumb 'Home / Registrar / Programs /' at the top left. The main heading is 'Hi there. Let's find a major or degree program that fits you.' Below this, there are five blue buttons with white text and right-pointing arrows: 'I like to...', 'I want to be a ...', 'I'm searching for ...', 'Browse all programs', and 'Online programs'. A blue semi-transparent box is overlaid on the right side, containing a list of ten interests, each preceded by a small white square icon: 'help others', 'work with technology', 'work with hands', 'solve problems', 'experience new places and cultures', 'be outside', 'be creative', 'entertain others', 'crunch numbers', and 'teach others'. The background of the website is a blurred image of a person riding a bicycle on a city street.

...Than Others

Index of Academic Degrees, Certificates and Programs Listed Alphabetically



- [Accounting, M.S.](#)
- [Adapted Physical Education Added Authorization APEAA](#)
- [Adult-Gerontology Primary Care Nurse Practitioner \(AGPCNP\) Specialty Certificate](#)
- [Anthropology, B.A.](#)
- [Anthropology, M.A.](#)
- [Art Credential Program](#)
- [Art, B.A.](#)
- [Art, M.A.](#)
- [Art, M.F.A.](#)
- [Asian and Asian American Studies, B.A.](#)
- [Aviation Administration, B.S.](#)
- [Biochemistry, B.S.](#)
- [Biology, B.S.](#)
- [Biology, M.S.](#)
- [Business Administration, B.S.](#)

Do You Want to Read All This?

Biology, B.S.



← Return to: [Index of Academic Degrees, Certificates and Programs Listed Alphabetically](#)

For Major Specific Admissions Criteria go to [http://www. \[redacted\] .edu/admissions/major-specific-criteria](http://www. [redacted] .edu/admissions/major-specific-criteria)

The Bachelor of Science degree in Biology provides an integrative experience emphasizing core concepts and cutting-edge techniques from areas such as molecular, cellular and developmental biology; genetics; and organismal, ecological, and environmental biology. The degree may lead to graduate study in biology or related fields, entrance into health professional schools, or employment in other technical applications of biology. The department also participates in the Interdisciplinary Bachelor of Science degree program in Natural Science.

The total number of units required for the Bachelor of Science degree in Biology is 120 units, of which 48 units are required in General Education (GE) with 9 units of GE double-counted for GE and major, which leaves 81 units in the major. For GE, Biology majors must complete 9 units of Communication and Critical Thinking (GE Block A1, A2, and A3) + 6 units of American Institutions + 6 units of Arts and Humanities (GE Block C) + 6 units of Social Sciences (GE Block D) + 3 units of Life-Long Understanding (GE block E, which can be fulfilled by completing the IHE course) + 9 units of Upper Division (UD) GE. To fulfill the Upper Division GE requirement, students must complete one course in each of the three following breadth areas (Natural Science and Mathematics; Humanities; and Social Sciences). Two GE courses must be certified as Diversity courses (d = Designated Diversity courses). At least one diversity course must focus on race and ethnicity and will be designated with re in the catalog (re = Race and Ethnicity Designated Diversity course). One GE

Neither do your prospects.



Focus on What Matters

College of Arts & Sciences

Biology

#1

Most popular major
at

50%

of Bio students
conduct research

9.8M

Total extramural
research funding

[Home](#) / [Registrar](#) / [Programs](#) / [Biology](#)

Biology is the study of LIFE. It is the exciting study of how living systems do their business: How plants produce nearly every bite of edible food through photosynthesis. How microorganisms

College of Arts & Sciences

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Student Interested in Biology and Biological Sciences

Eduventures' 2019 Student Sentiment Survey find that these students...

- Care more about research opportunities with faculty than their peers (54% vs. 29% of students interested in other majors)
- Are already more focused on graduate school (34% vs. 10%) and;
- Want to get a solid foundation for graduate or professional school (48% vs. 25%)
- Less likely than their peers to click on an online ad sponsored by a school (24% vs. 42%.)



Student Interested in Criminal Justice and Emergency Services

Eduventures' 2019 Student Sentiment Survey find that these students...

- Are more likely to find college-sponsored online ads helpful and informative (48% vs. 27% of students interested in other majors.)
- Are more likely to click on these ads (53% vs. 40%)
- Are less likely to complete a profile on a college planning site like Naviance, Niche or Cappex (49% vs. 65%)
- Visit college websites less frequently, or “every once in a while”, on a mobile device (57% vs. 34%.)



Student Interested in Health Professions Related Majors...

Eduventures' 2019 Student Sentiment Survey find that these students...

- More often research colleges on Instagram (71% vs. 57% of students interested in other majors)
- Do their college search primarily on a smartphone (49% vs. 38%)
- Have watched a video from a current student (48% vs. 37%)
- Appreciate communications from schools they had not previously considered, and found it helpful/informative to receive:
 - Print materials (66% vs. 52%)
 - Emails (59% vs. 47%), and
 - Text messages (57% vs. 33%) from these schools



And Who Do You Attract?

Eduventures' 2018 Survey of Admitted Students shows that students interested in specific majors also show a preference for specific institutional types.

	Public Baccalaureate	Public Masters	Public Doctoral	Private Baccalaureate	Private Masters	Private Doctoral
Health Professions	✓	✓			✓	
Engineering			✓			✓
Natural and Physical Sciences			✓	✓		✓
Business			✓			✓
Education	✓	✓		✓	✓	
Humanities and Liberal Arts				✓		✓
Visual and Performing Arts		✓		✓	✓	

Remember the Equation?

High Student Demand + Good Labor Market = Opportunity

It's not enough.



Real Life Examples



Bachelor's in Information Technology

Some context:

- A small, private baccalaureate college
- Located in the northeast
- Rural setting
- Wants to diversify its academic portfolio

Positive market signals

- National 2013-2017 Conferral CAGR: 10%
- National 2013-2017 Provider CAGR: 3%
- Regional 2013-2017 Conferral CAGR: 13%
- Regional 2013-2017 Provider Growth 5%

Majority of matched occupations projected to experience faster growth than the regional average for all jobs.

Information Technology: Regional* Conferrals



Labor Market Demand- Regional*

Regional Labor Market Demand: All Occupations

SOC	Description	2018 Jobs	2028 Jobs	2018-2028 Change	2018-2028 % Change
All SOC Codes	All Occupations	25,402,692	27,472,907	2,070,215	8%

Regional Labor Market Demand: Identified Occupations

SOC	Description	2018 Jobs	2028 Jobs	2018-2028 Change	2018-2028 % Change
11-3021	Computer and Information Systems Managers	81,479	89,071	7,592	9%
15-1111	Computer and Information Research Scientists	4,576	5,581	1,005	22%
15-1121	Computer Systems Analysts	104,009	112,825	8,816	8%
15-1122	Information Security Analysts	18,454	22,550	4,096	22%
15-1132	Software Developers, Applications	171,144	210,951	39,807	23%
15-1133	Software Developers, Systems Software	75,017	81,446	6,429	9%
15-1143	Computer Network Architects	29,069	30,496	1,427	5%

A closer look...

Rural institutions may be facing an uphill battle establishing information technology programs. Segmenting by degree of urbanization, of the 337 bachelor's IT programs identified in 2017, 11 programs (3%) were offered at rural institutions conferring 62 degrees (<1%) .

Row Labels	Private for-profit		Private not-for-profit		Private not-for-profit (religious)		Public		2017 Total	
	Conferrals	Programs	Conferrals	Programs	Conferrals	Programs	Conferrals	Programs	Conferrals	Programs
City: Large	644	41	229	13	204	18	948	14	2025	86
City: Midsize	964	19	19	2	164	10	855	21	2002	52
City: Small	148	10	193	7	130	8	815	19	1286	44
Rural: Distant	12	1	1	1	0	1			13	3
Rural: Fringe			0	1	4	2	26	1	30	4
Rural: Remote					0	1	19	3	19	4
Suburb: Large	221	34	612	12	100	15	1521	18	2454	79
Suburb: Midsize	8	2					136	5	144	7
Suburb: Small	0	1			0	1	49	4	49	6
Town: Distant	3	1	5	2	47	5	387	14	442	22
Town: Fringe	271	3			52	4	27	2	350	9
Town: Remote	2	3			19	7	132	11	153	21
Grand Total	2273	115	1059	38	720	72	4915	112	8967	337

Possible reasons?

What are the top five expectations you have for your college education?



What are the top five experiences you expect to learn the most from during your college education?



■ National sample ■ Prospective students interested in computer science and information technology

Healthcare Interpreter Certificate

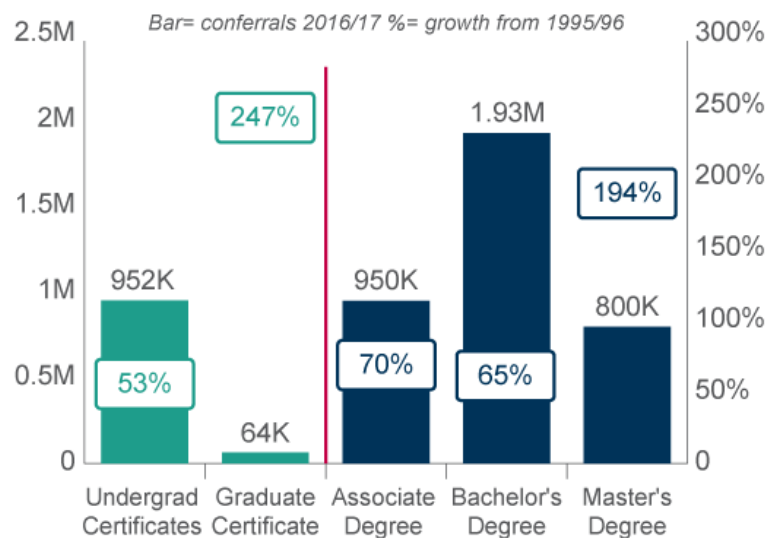
Some context:

- A public institution located in Texas seeking to grow for-credit/non-credit certificate programming
- Interested in launching a health care interpreter certificate
- Wanted to find specific geographic opportunities within the state where demand may be high

Certificate Market

Nice Work Certificates,
but Degrees Still Win?

- On the surface, certificate growth is impressive
- However, degrees have also experienced considerable growth
- Another wrinkle- issues exists around the quality and extent of certificate data



Source: Eduventures analysis of IPEDS data.
Data spans four, two and less-than-two year schools that report to IPEDS.

Certificate Data is Rubbish

The dirty secret is that certificate data leaves a lot to be desired. In our research, it is commonplace to find big discrepancies between the number of certificates reported to IPEDS—the federal postsecondary education database—and the number listed on the school's website. This is particularly a problem at the graduate level, and appears to stem from an ambiguity in federal reporting requirements.

Look on the Institutional Research (IR) page at many schools and you will see reference to "IPEDS Award Definitions." For example, the University of Illinois' page says that IPEDS defines a post-baccalaureate certificate as "18 semester credit hours" beyond a bachelor's, and a post-master's certificate as "24 semester credit hours" beyond a master's. Many certificate programs are shorter than these minimums, which means that schools may not report all their certificate enrollment or conferrals to IPEDS, under-counting certificate volume.

Curiously, such IR pages never actually link back to an IPEDS source. You will look in vain for these definitions on IPEDS today. The 2017/18 IPEDS Data Collection System completion guide defines both types of certificates without reference to any credit minimum. In fact, the definitions cited by University of Illinois and other schools refer to an out-of-date IPEDS glossary. The last time the IPEDS glossary used credit minimums to define graduate certificates was in the 2011/12 academic year, yet schools continue to cite the old rules.

Basic formula

- Certificate data nonexistent for this market, but degree conferral data indicates small markets with some growth. Is there student demand?
- Occupational outlook tells a different story- high demand and fast job growth.

Language Interpretation and Translation- All Degree Conferrals

Occupational Outlook*

National and Regional* Markets

National projected growth:



SOC	Description	2018 Jobs	2028 Jobs	2018 - 2028 Change	2018 - 2028 % Change
All SOC Codes	All Occupations	144,430,503	158,617,974	14,187,471	10%
27-3091	Interpreters and Translators	54,440	65,741	11,301	21%

Regional projected growth:

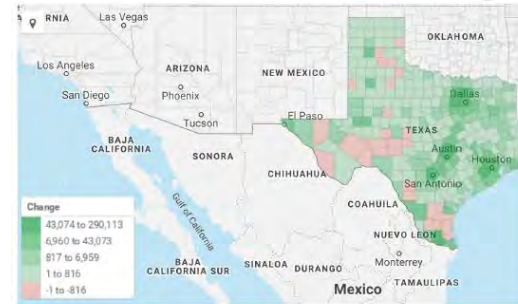
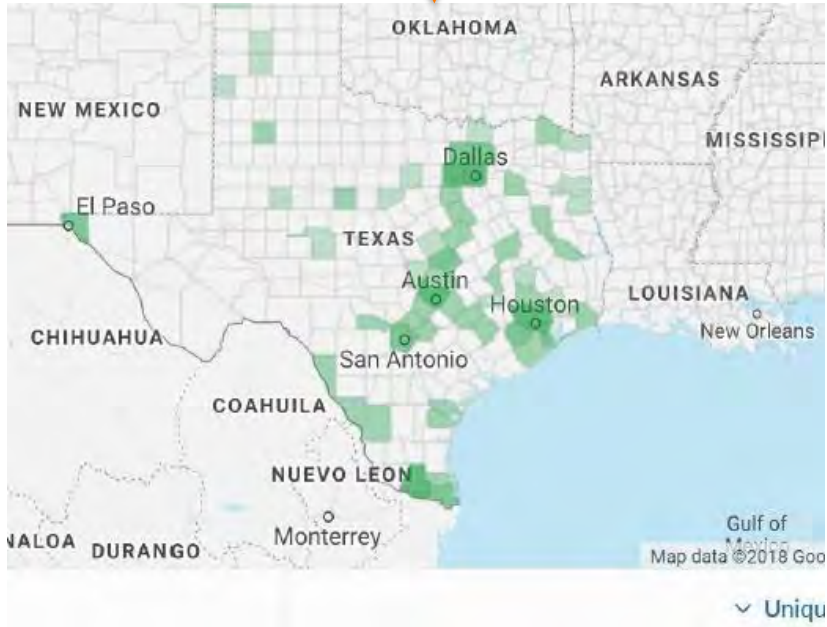
SOC	Description	2018 Jobs	2028 Jobs	2018 - 2028 Change	2018 - 2028 % Change
All SOC Codes	All Occupations	12,073,794	14,118,482	2,044,688	17%
27-3091	Interpreters and Translators	4,895	6,230	1,335	27%



Healthcare Interpreter Certificate

A deeper dive into occupation-aligned data, looking specifically at job postings with key words “medical interpreter” or “healthcare interpreter” begins to reveal areas of higher intensity job posting.

Demographic trends, segmenting specifically for race/ethnicities for which English might not be the first language, align with job posting activity, as major metropolitan areas in Texas begin to show areas of opportunity.



County	County Name	2018 Population	2028 Population	Change	% Change
48201	Harris County, TX	2,388,294	2,678,407	290,113	12%
48113	Dallas County, TX	1,245,585	1,387,322	141,737	11%
48029	Bexar County, TX	1,263,021	1,403,629	140,608	11%
48439	Tarrant County, TX	725,321	835,763	110,442	15%
48157	Fort Bend County, TX	355,645	435,830	80,185	23%
48405	Collin County, TX	305,117	376,994	71,877	24%
48215	Hidalgo County, TX	815,018	885,423	70,405	9%
48453	Travis County, TX	513,244	582,581	69,337	14%
48441	Denton County, TX	246,561	305,743	59,182	24%

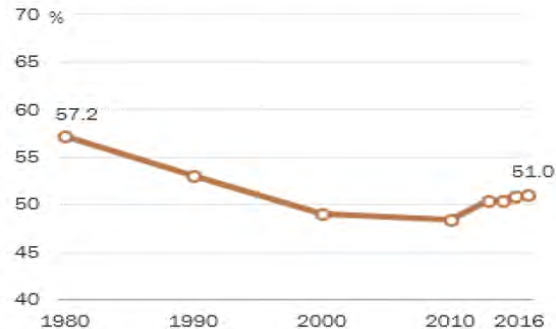
Healthcare Interpreter Certificate

20 metropolitan areas with the largest number of immigrants in 2016



Half of immigrants in U.S. are English proficient as of 2016

% of foreign-born population ages 5 and older who are English proficient



- Pew Research labeled Dallas and Houston as two top 20 metro areas with large # of immigrants
- English proficiency among immigrant population has declined overall since 1980

- Local need established though qualitative research

Demand in the US for Legal and Healthcare Interpreters Gets Increasing Media Attention

1 Year Ago Demand Drivers · By Gino Diño On January 17, 2018



17 minutes Cyber / Health Care

No comprende? Hospitals are hiring more interpreters to change that

LIFESTYLE / HEALTH

Medical interpreters in short supply as health coverage grows

Why This Texas Hospital System Is Doubling Down on Hiring In-House Interpreters

By Esther Bond on May 23, 2018

150 Languages and Counting: The Critical Need for Interpreters in DFW Hospitals

Nearly half of the patients at Parkland Hospital have limited English proficiency
By Courtney Gilmore

Source: Pew Research



RN to BSN/Rural Nursing

Some context:

- Public, rural institution in the southeastern United States
- Specific questions and concerns around the state of rural nursing spurred through conversations with local employers around nurse retention

RN-BSN Market Snapshot

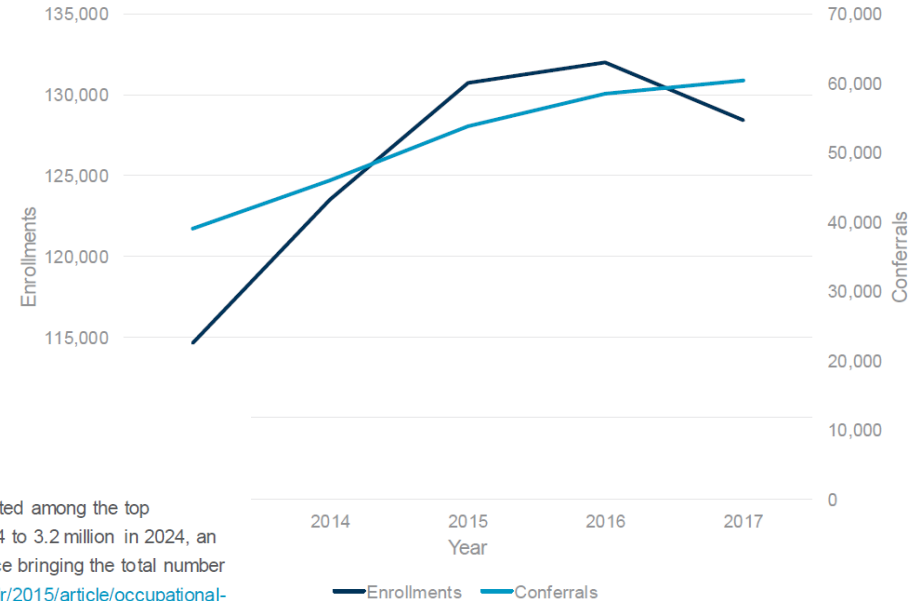
- RN to BSN conferral market is healthy, but there was a slight enrollment drop experienced in 2017. Beginning of a trend?
- Research and expert analysis shows that any negative enrollments is not necessarily related to decreasing student demand.

AACN Enrollment Notes

- According to the Bureau of Labor Statistics' *Employment Projections 2014-2024*, Registered Nursing (RN) is listed among the top occupations in terms of job growth through 2024. The RN workforce is expected to grow from 2.7 million in 2014 to 3.2 million in 2024, an increase of 439,300 or 16%. The Bureau also projects the need for 649,100 replacement nurses in the workforce bringing the total number of job openings for nurses due to growth and replacements to 1.09 million by 2024. <https://www.bls.gov/opub/mlr/2015/article/occupational-employment-projections-to-2024.htm>
- Though AACN reported a 3.6% enrollment increase in entry-level baccalaureate programs in nursing in 2016, this increase is not sufficient to meet the projected demand for nursing services, including the need for more nurse faculty, researchers, and primary care providers.
- According to AACN's report on *2016-2017 Enrollment and Graduations in Baccalaureate and Graduate Programs in Nursing*, U.S. nursing schools turned away 64,067 qualified applicants from baccalaureate and graduate nursing programs in 2016 due to insufficient number of faculty, clinical sites, classroom space, and clinical preceptors, as well as budget constraints. Almost two-thirds of the nursing schools responding to the survey pointed to a shortage of faculty and/or clinical preceptors as a reason for not accepting all qualified applicants into their programs.

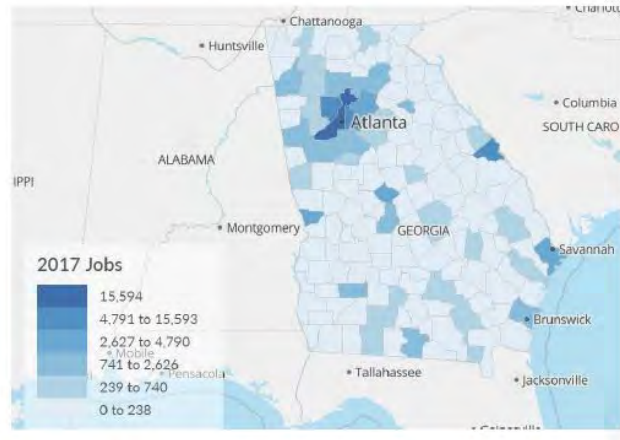
Source: American Association of Colleges of Nursing

RN to BSN Enrollment and Conferral Trends*: National Market



Rural-focused research

- Not surprisingly, most nursing jobs are clustered around highly populated MSA's
- One potential challenge: the type of available nursing jobs in rural areas
- Rural pay varies, but not all lag far behind more populated MSA's



NAICS Code	Description	Atlanta-Sandy Springs-Alpharetta, GA	Hinesville, GA
622110	General Medical and Surgical Hospitals	60%	0%
621111	Offices of Physicians (except Mental Health Specialists)	9%	1%
621610	Home Health Care Services	4%	0%
623110	Nursing Care Facilities (Skilled Nursing Facilities)	3%	2%
901199	Federal Government, Civilian, Excluding Postal Service	2%	40%
	Total	79%	44%

Source: QCEW Employees - Emsi 2019.1

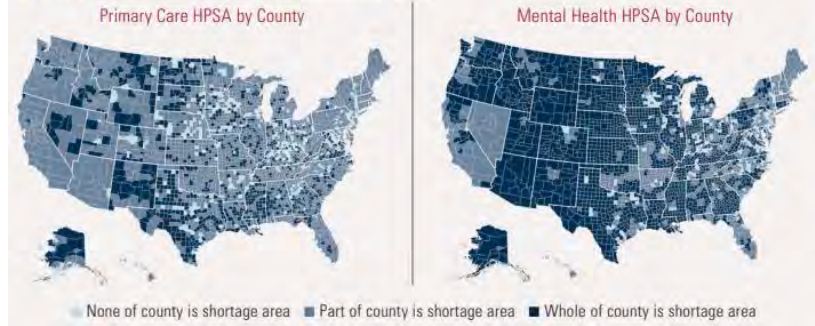
Rural-focused research

Secondary research points to numerous, additional challenges (e.g. workforce shortage)

Figure 2: Persistent, Recent, and Emergent Challenges Facing Rural Communities



Figure 3: HPSAs in Non-metro Counties, 2017



Efforts to Recruit and Retain Registered Nurses

Against the backdrop of the current, and projected, nursing shortage, health care systems have implemented a variety of initiatives to recruit and retain registered nurses (not limited to rural nursing).

Scripps Health (San Diego, CA)

- Develops existing staff through education and transition programs (for more specialized nursing).
- Conducts seasons workforce planning and provides financial incentives to fill this need.

Mission Health (Asheville, NC)

- Often relying on travel nurses to help fill the need, Mission Health offers signing bonuses of \$5,000-\$10,000 in return for a minimum commitment of time. Also employees providing referrals.

Customized research on best practices around recruiting and retaining registered nurses (e.g. relocation bonuses, continued education funding, loan repayment, residency/training programs).

Changing the Formula



The Way Many Think About Program Feasibility

High Student Demand + Good Labor Market = Good Opportunity



The Way *Eduventures* Thinks About Program Feasibility

High Student Demand + Good Labor Market + Good Marketing + Favorable Circumstances + Strong Institutional Fit = Low Risk



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Thank you.