

# **Provost's Town Hall Meeting**

**Wednesday, November 29**

**1-3 p.m.**

## **Welcome**

**Jeremy Haefner, Provost and Senior Vice President for Academic Affairs**

## **Update from the RIT Marketing Division**

**John Trierweiler, Vice President and Chief Marketing Officer**

**Kin Sejpal, Assistant Vice President, Marketing & Branding**

## **Disruptions on the horizon of American higher education**

**Jeremy Haefner, Provost and Senior Vice President for Academic Affairs**

**Neil Hair, Executive Director, Innovative Learning Institute**

**Jim Hall, Executive Director, School of Individualized Study**

# RIT Marketing and Communications

## Updates on Organization and Key Initiatives

*John Trierweiler and Kin Sejpal*  
*Marketing and Communications*  
*Nov. 29, 2017*

UNS  
UPub  
P.S.



M&C  
Division:  
7/6/17

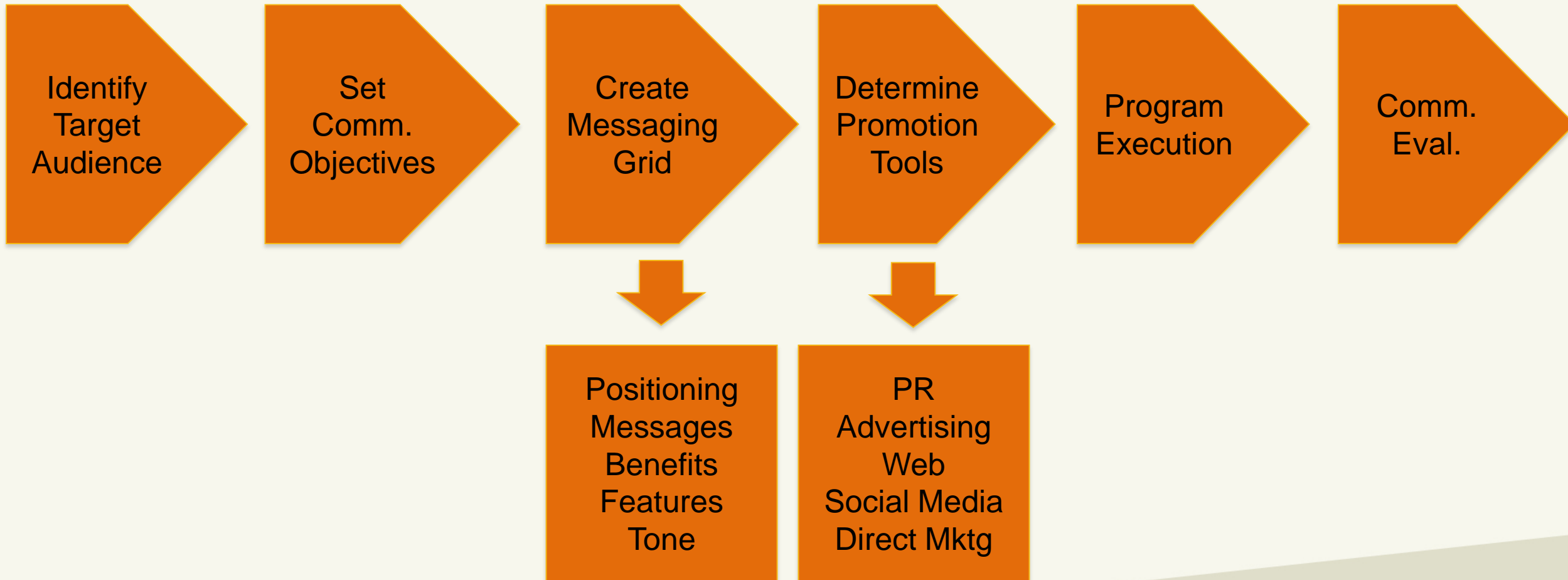


M&C  
Division:  
FY18  
and  
beyond

# Functional Activities



# Sample Activity Process Flow





# What about University News Services?

Perception.



Reality.



# What about University Publications?

Perception.



Reality.





# What about Production and Web Services?

Perception.



Reality.



# What about Marketing?

Perception.



Reality.



# The *New* M&C

## Before.

- University News Services
- University Publications
- RIT Production Services
- University Web Services

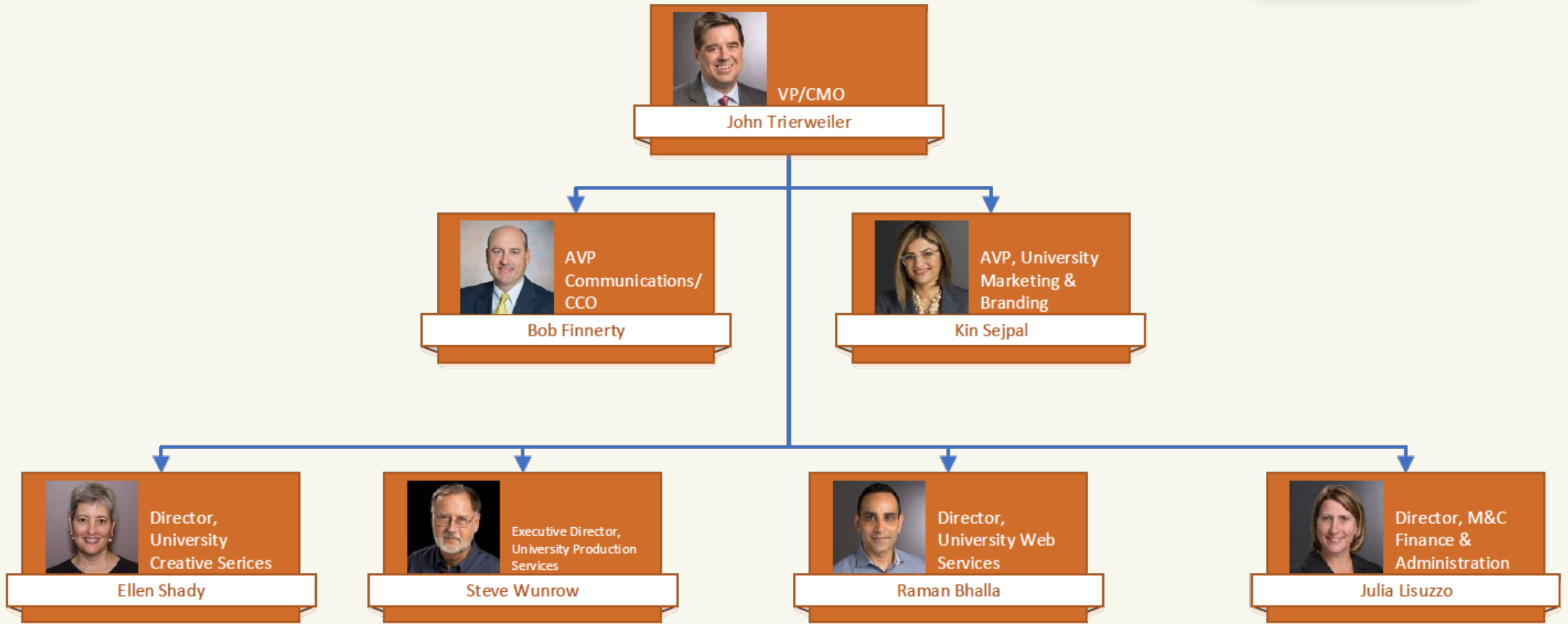
## After.

- University Communications
- University Creative Services
- University Production Services
- University Web Services
- University Marketing and Branding
- M&C Finance and Administration

We are  
***One***  
Team...



...serving  
***One***  
University!





# Form Follows Function

- University Communications
  - Reporters/Writers/PR
  - Social Media Managers
- University Marketing and Branding
  - Researchers/Analysts
  - Marketing Strategists
  - Brand Managers
- M&C Finance and Administration
  - Finance/Purchasing/Operations/Administrative Support
- University Creative Services
  - Designers
  - Copywriters
- University Web Services
  - Developers
  - Photographers
- University Production Services
  - Videographers
  - Directors/Producers
  - Engineers and Program/Event Support

## We Are “*Open for Business!*”

- First monthly M&C Division newsletter, including announcement of org/name changes, was published in October
- M&C Division website was launched in October:  
***<https://www.rit.edu/marketing/>***
- Establishing one central intake process and tiered levels of service: (1) M&C Division, (2) partner agencies, (3) small pool of approved preferred vendors
- Working toward unifying the Division through co-location



## Optimal Brand Positioning

Brand Health Tracker  
W  
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Brand Identity System

	FY18				FY19			
TENTATIVE CALENDAR/TIMING	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1. BRAND HEALTH TRACKER								
- Qualitative research complete	X							
- Quantitative research and brand drivers/key takeaways complete		X						
- Presentations, roadshows, and conversation with the RIT community		X	X					
2. BRAND IDENTITY SYSTEM								
- Brand strategy and brand architecture strategy complete			X					
- Creative concepts and marketing toolkit complete				X				
- Presentations, roadshows, and conversation with the RIT community				X	X			
- Formal launch of new brand identity system						X		
3. WEBSITE REDESIGN								
- UX strategy, information architecture, content mgt, wireframes complete		X	X	X				
- 50 design templates with final style guide and look-and-feel received				X				
- Coding, technical support, content development needed for launch			X	X	X	X		
- Presentations, roadshows, and conversation with the RIT community		X	X	X	X	X		
- Redesigned RIT.edu, 9 colleges, EMCS, and DAR launched							X	



# Brand Health Tracker

## Key Takeaways and Strategy Drivers

*John Trierweiler and Kin Sejpal*  
*Marketing and Communications*  
*Nov. 29, 2017*

# Outline and Goals

- **Brand Positioning Study (SimpsonScarborough)**
  - What is better, different, and special about RIT in the minds of key stakeholders?
  - Understand:
    - Relevancy (to customers)
    - Relativeness (to competitors)

# Research Methodology Overview

## Internal



### Current Students (Grad and UG)

On-Campus Discussions

Online Survey, ***n=1,328***

- Median Length, ***15 minutes***
- Response Rate, ***9%***

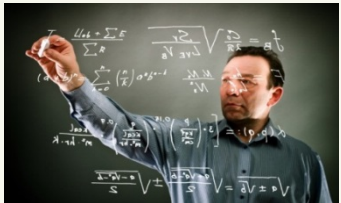


### Alumni

Three Online Focus Groups

Online Survey, ***n=2,807***

- Median Length, ***18 minutes***
- Response Rate, ***4%***



### Faculty (Except Adjuncts)

On-Campus Discussions

Online Survey, ***n=239***

- Median Length, ***17 minutes***
- Response Rate, ***21%***



### Staff

On-Campus Discussions

Online Survey, ***n=532***

- Median Length, ***17 minutes***
- Response Rate, ***22%***

## External



### Prospective Undergraduate Students

Inquiries only

Online Survey, ***n=702***

- Median Length, ***9 minutes***
- Response Rate, ***2%***



### Prospective Graduate Students

Inquiries only

20 In-Depth Telephone Interviews

Online Survey, ***n=198***

- Median Length, ***12 minutes***
- Response Rate, ***2%***



### Employers

25 In-Depth Telephone Interviews

Online Survey, ***n=376 non-brand, 19 brand***

- Median Length, ***15 minutes***
- Response Rate, ***5% non-brand, 10% brand***



### Guidance Counselors

Online Survey, ***n=178***

- Median Length, ***12 minutes***
- Response Rate, ***2%***



### Peers

20 In-depth Telephone Interviews

## Profile of Internal Audiences

Type	
Undergraduate	87%
Graduate	13%

Type		
Faculty		31%
Staff		69%
Years at RIT	Faculty	Staff
Less than 1	2%	6%
1-3	13%	18%
4-5	7%	11%
6-10	18%	23%
11-15	22%	16%
16-20	12%	11%
More than 20	26%	15%

Type	
Alumni	
Decade of Graduation	
1970s or before	11%
1980s	12%
1990s	13%
2000s	29%
2010s	34%

# Executive Summary

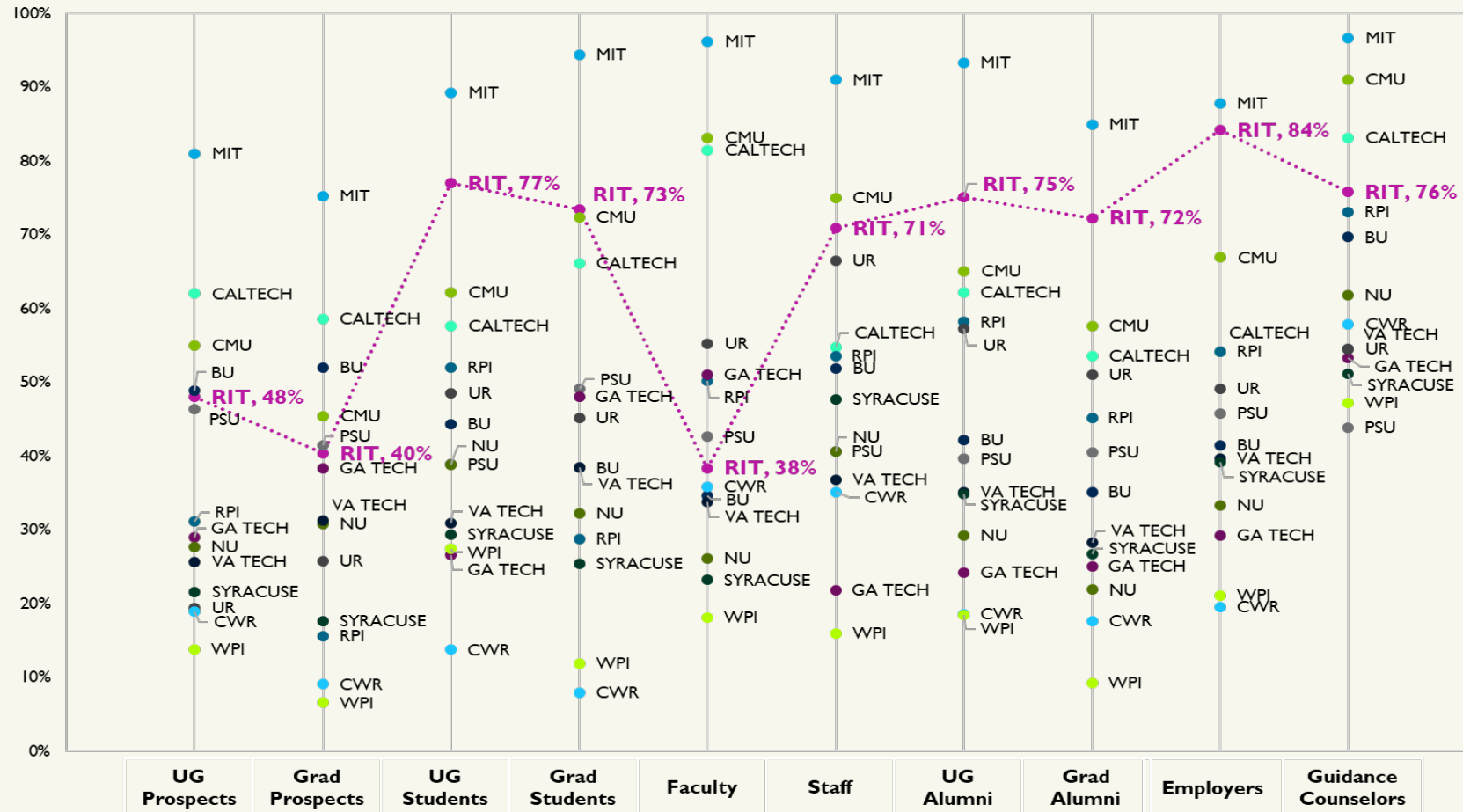
- There is **overall alignment on the future** direction of RIT.
- RIT has **made significant headway** in pivoting from some of the “existing” brand associations to the “desired” associations.
- Of the three messaging statements tested, the statement about the **intersection of scientific and creative thinking** was most appealing across audiences.
- **Guidance counselors and employers** in particular have an **extremely favorable opinion** of RIT and strong perception of its graduates.
- There is a noticeable “**faculty dip**” throughout where faculty responses are significantly lower than other internal audiences.
- **Alumni are split** regardless of decade of graduation on whether RIT should be a place of technical, professional learning for a specific purpose or a place of practical and creative learning for experimentation.
- Audiences use the terms **innovative, technical, co-op, diversity, and student-focused** to positively describe RIT.
- Audiences use the terms **cost, weather, size, location, isolated, boring, nerdy, and bureaucracy** to negatively describe RIT.



# BRAND BENCHMARKS

# Excellent Schools (Aided)

When selecting from a national competitive pool, RIT ranks higher than most other universities from the list.

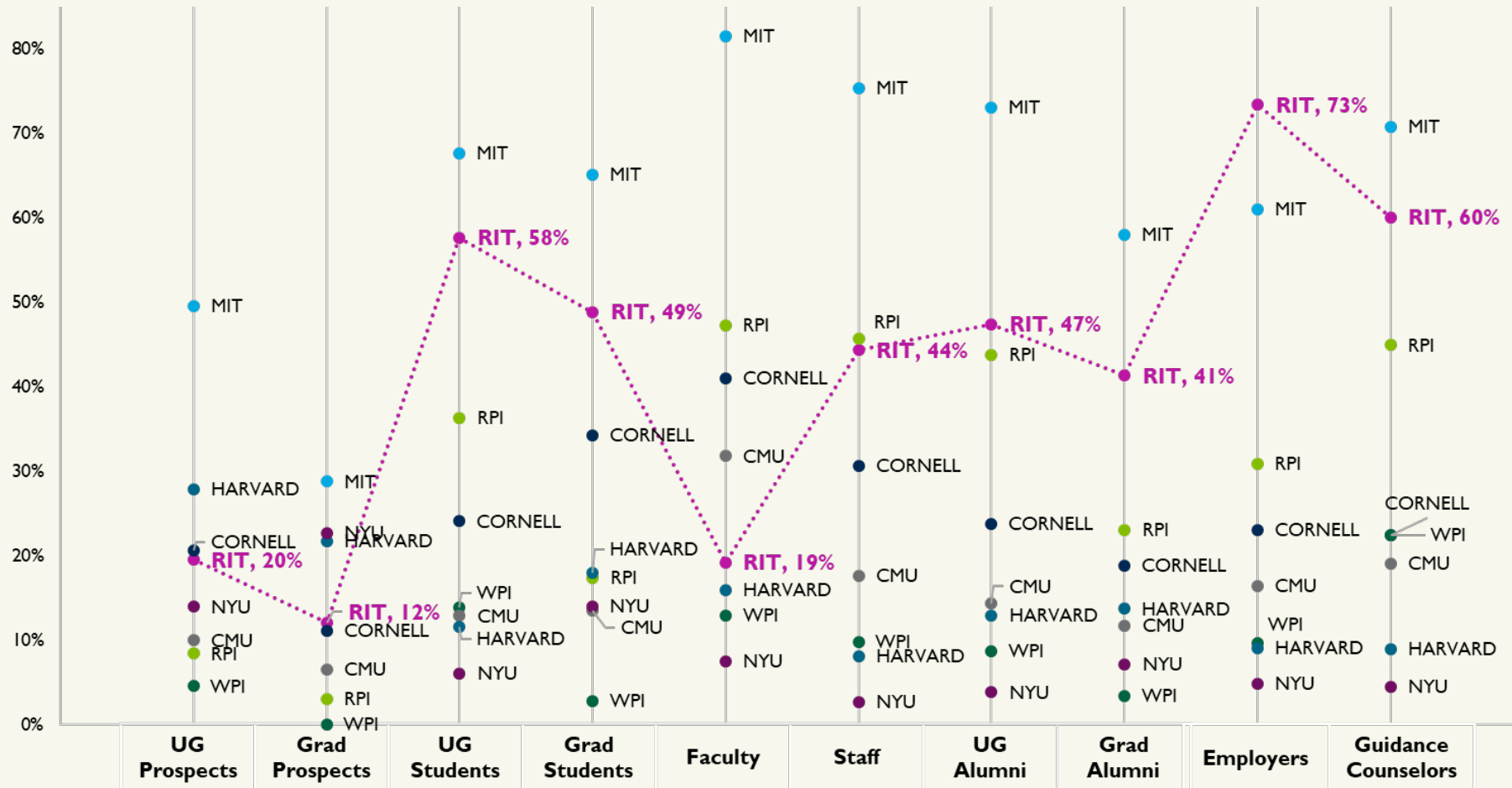


Which of the following colleges and universities, if any, do you consider to have an excellent reputation? (select all that apply)

Chart includes schools selected by at least 40% of at least one audience

# Excellent Schools (Unaided)

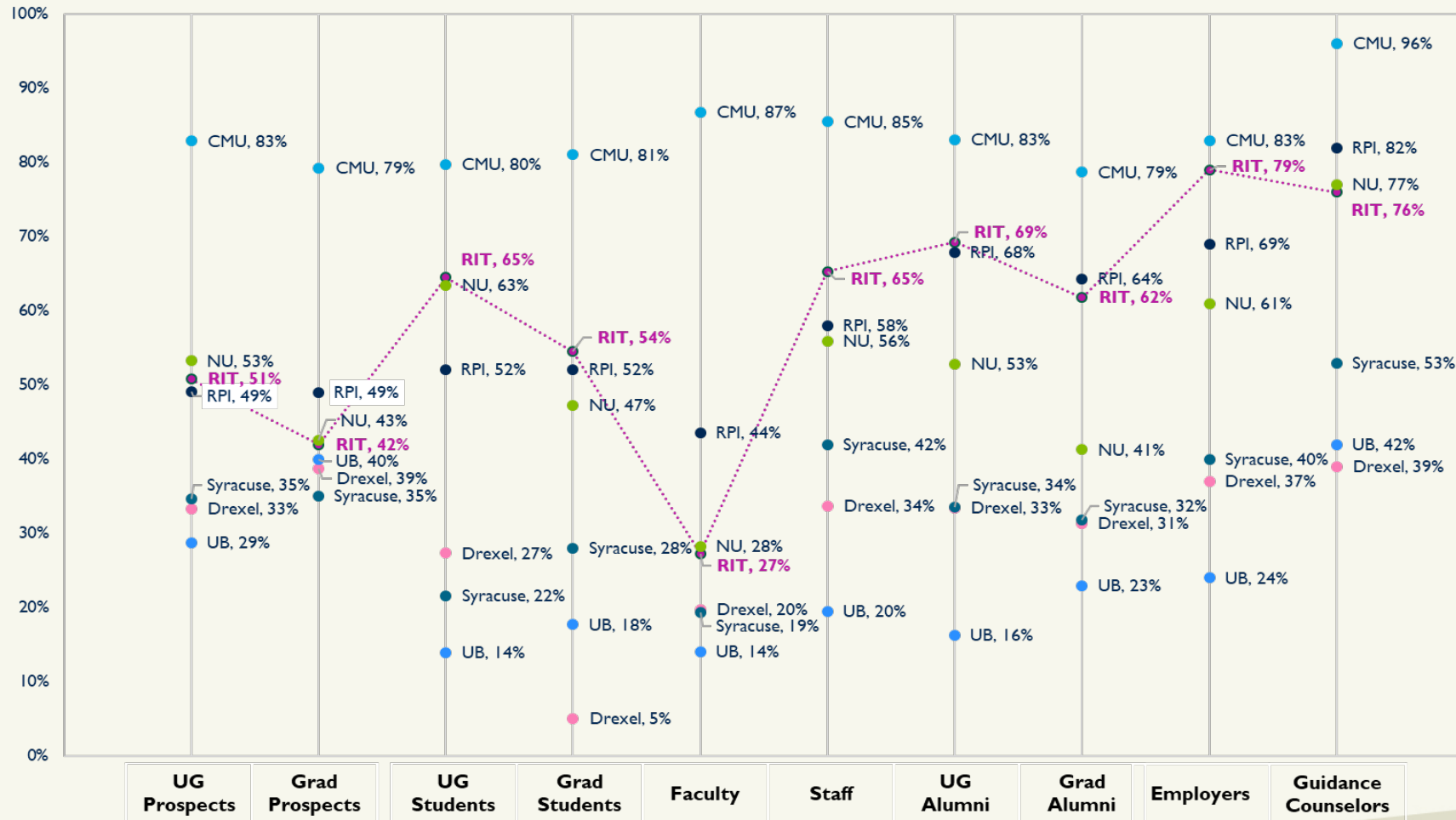
In comparing regional schools, RIT ranks second for current students, alumni, and counselors. It ranks first for employers.



When you think of excellent colleges and universities in the NORTHEAST with a focus on STEM (science, technology, engineering, and mathematics), which ones come to mind FIRST? (open-end, accept up to five)  
 Chart includes schools mentioned by at least 20% of at least one audience

# Academic Quality Ratings (% Excellent)

Carnegie Mellon leads the pack with RIT falling in line with Northeastern and RPI.



What is your perception of the ACADEMIC QUALITY of each of the following  
(Only asked if at least heard of the school)

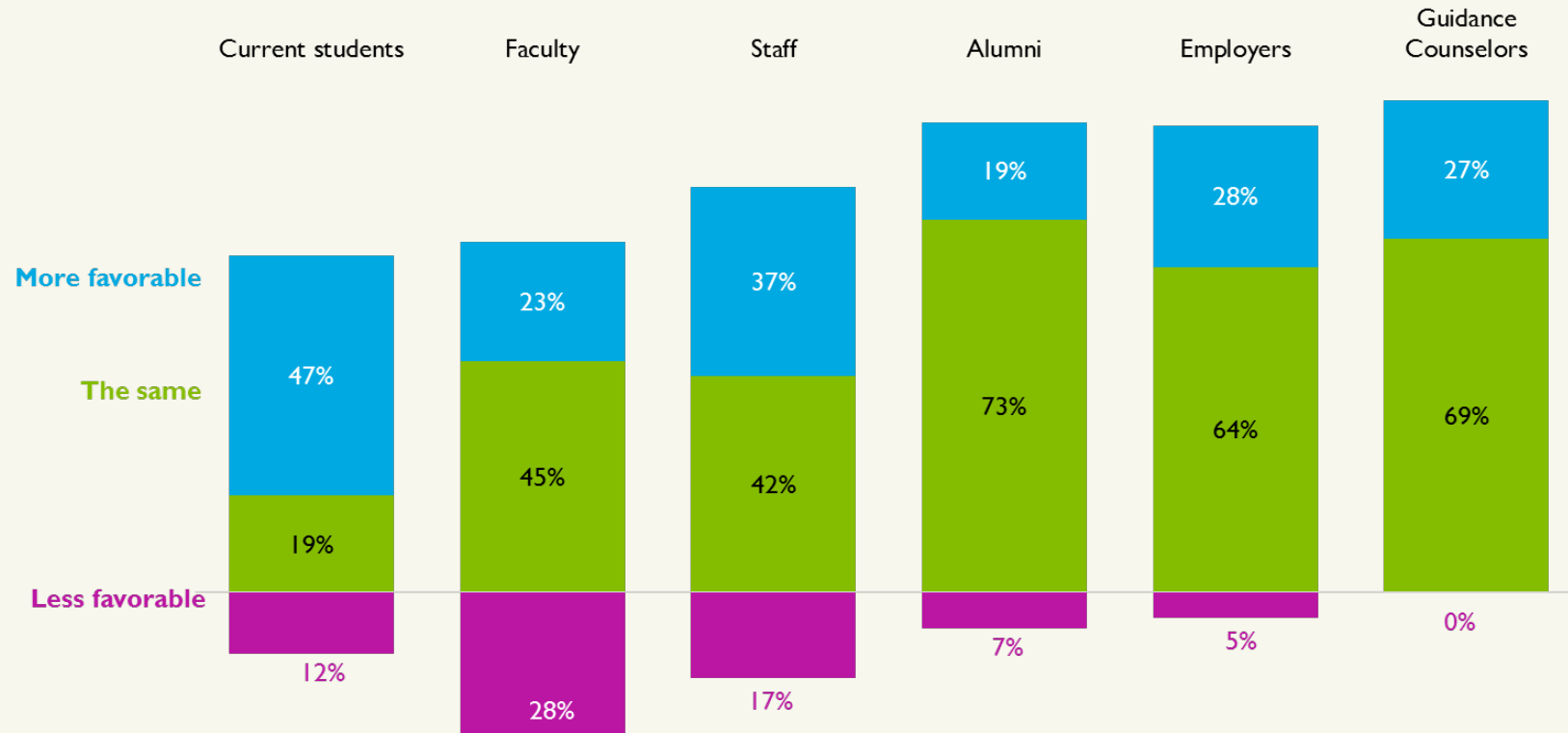
# STRATEGY DRIVERS



# Strategy Driver #1

The majority of audiences say their opinion of RIT is more favorable or the same compared to 3 years ago. Nearly 1 in 3 faculty's opinion is less favorable.

## Opinion of Rochester Institute of Technology compared to 3 years ago



Compared to 3 years ago, is your opinion of Rochester Institute of Technology (RIT)...?  
Scale: less favorable/more favorable/the same/I wasn't aware of RIT 3 years ago

# Strategy Driver #1

There is clear agreement across all audiences as to where RIT should place emphasis in the future.

RIT should be...	Selected by at least 70%			
	Current Students	Faculty	Staff	Alumni
Academically rigorous and students take their academic pursuits seriously vs. Hard work and students are primarily focused on academics	82%	91%	90%	82%
Prepares you for a career vs Prepares you for a job	93%	95%	96%	93%
Learning encourages critical thinking, exploration and invention vs. Learning is focused on preparing for the workforce	84%	86%	87%	76%
A specialized major, but also have opportunities to explore other interests outside their major vs. A specialized major with no opportunity to explore other interests	94%	97%	98%	93%
Practical and creative learning for experimentation vs. Technical, professional learning for a specific purpose	74%	78%	78%	55%
A comprehensive university experience for undergraduate and graduate students vs. focused primarily on undergraduate education	83%	80%	91%	80%
Teaches students how to think vs. teaches students how to do	80%	85%	81%	72%
Hands-on learning opportunities beyond co-op through internships, volunteer work, research, etc. vs. Hands-on learning opportunities primarily through co-op	85%	93%	94%	76%
High-impact research to address the challenges facing the global society and the planet vs. Research that focuses on and serves the needs of industry, and is often task-oriented	83%	83%	90%	68%

(Internal audiences and alumni) For each pair of statements below, select the option that you think BEST describes how RIT should be in the FUTURE?

# Strategy Driver #1

Although there is generally a consensus on the future direction of the university, most audiences – particularly faculty and alumni – raise concerns about the various transitions and changes the university is making.

## Reasons for less favorable opinion

### Faculty

- Internal politics
- Overworked and changes in workload
- Salary complaints

### Current Students

- Increase in tuition and same/decrease overall experience
- Lack of social experience/ student life
- Unfavorable experiences with faculty

### Staff

- Lack of advancement opportunities
- Salary complaints
- Internal politics

### Alumni

- **Change to semester system**
- **Shift in direction: from focus on technical, teaching institution to a comprehensive, research institution**
- Student debt from their RIT education

### Employers

- Increase in and quality of international graduates
- **Change to semester system**
- **Shift to research**

“I think the institute has a **great vision for the future and is moving in the right direction, but I do worry about balance.** Faculty are being maxed out by assuming more administrative responsibilities and students are often over-wound, overworked and anxious.”

– Faculty/Staff

“The danger of pushing into more ivy league pursuits is that **graduates risk becoming great thinkers at the expense of being able to actually be productive.** The focus on making folks productive is a relatively unique attribute of RIT, and one that is appreciated by commercial enterprises.”

– Alum

“**RIT has grown and become successful at an inspiring rate.** The evolution from an associates granting institution to a research institution is amazing. However, **it occasionally feels as if we are out of tune with what is required to take the next step in achieving our aspirational goals.**”

– Faculty/Staff

# Strategy Driver #1

Audiences not only acknowledge the current transitions, but are encouraged by the upward trajectory of the institution and are excited about President Munson's appointment.

**“Dave Munson becoming president has caused me to think perhaps this is an institution on the move. That is a change in a positive direction.** I want to be careful, I'm not saying that my opinion of the quality of the work done at RIT has changed, but it's caused me to sit up and say this is something I should pay attention to.”

– Academic Peer

**“Hopeful our new President will move us in a positive direction.”**

– Faculty/Staff

**“I believe RIT is on an upward trajectory and I am excited to see the direction that RIT will go under Dr. Munson's leadership.”**

– Faculty/Staff

**“There are some really amazing things happening here. With a new President and the renewed energy and focus on RIT's brand, there's a lot of exciting potential for RIT's future.”**

– Faculty/Staff

# Strategy Driver #1

Key takeaway: RIT's various transitions are recognized and primarily supported by all audiences.

However, there is a faction of faculty and alumni who are resistant to and vocal about the changes. These audiences in particular need to be segmented for targeted communications that help bring them along.

**Use President Munson's  
appointment and the brand strategy  
to share a vision for  
the university.**

# Strategy Driver #2

The following full messaging statements were tested. Statements were tested in their entirety and then broken out by key underlined phrases.

## Minds Full

To accomplish extraordinary things, to evolve as learners, excel as professionals, and to propel humanity forward, there must be a meeting of the minds, a joining of both the right and left sides of the brain. It's the sort of education that makes for well-rounded students and whole brain thinkers. Because whether a student views him or herself as a future artist or a scientist, in today's complex, multidisciplinary world, they need to be both.

## Doers

Our students are different; they're doers. They're here because they have a strong idea about what they want to do someday. We provide them with skills, knowledge, and real-world opportunities to do it, every day. Some might call our natural tendency and our tenacity for getting things done, for working hands-on, heads-down, and hearts-full, a deep passion or a strong work ethic. It's both. And doing is not only second nature, but it's nurtured from day one.

## Pacesetters

To be transformational, to use change to one's advantage—and to society's betterment—our students prepare to anticipate change and to stay at least a step-in front of it. We've seen centuries come and go, and the latest fads, hottest trends, newest technologies, and even entire industries succumb to time; they couldn't keep pace. Setting the pace drives us to keep moving forward, to look to the past, but to learn in the now and to live for the future.

## Strategy Driver #2

Of the three messaging statements tested, the statement about the intersection of scientific and creative thinking was most appealing. This concept was also frequently mentioned in qualitative discussion.

### Most appealing RIT statement

	UG Students	Grad Students	Faculty	Staff	UG Alumni	Grad Alumni	UG Prospects	Grad Prospects	<b>Minds Full</b> To accomplish extraordinary things, to evolve as learners, excel as professionals, and to propel humanity forward, there must be a meeting of the minds, a joining of both the right and left sides of the brain. It's the sort of education that makes for well-rounded students and whole brain thinkers. Because whether a student views him or herself as a future artist or a scientist, in today's complex, multidisciplinary world, they need to be both.
<b>Minds Full</b>	44%	44%	48%	49%	44%	41%	46%	42%	
<b>Doers</b>	36%	33%	32%	27%	35%	35%	33%	36%	
<b>Pacesetters</b>	20%	23%	20%	24%	21%	24%	21%	22%	

Which ONE of the following statements about RIT would MOST POSITIVELY impact your perception of the University? (select one)



# Strategy Driver #2

In the “Minds Full” messaging statement, the phrases about the increasingly complex world and the growing need for integrated thinking and problem-solving rose to the top.

## Minds Full

To accomplish extraordinary things,  
to evolve as learners, excel as professionals, and to  
propel humanity forward, there must be a  
meeting of the minds, a joining of both the right and left  
sides of the brain. It's the sort of education that makes for  
well-rounded students and whole brain thinkers. Because  
whether a student views him or herself as a future artist  
or a scientist, in today's complex, multidisciplinary  
world, they need to be both.

← Language about evolving and propelling humanity forward rises to the top across all audiences.

← Idea of exploring multiple interests is part of the overall appeal of this statement for UG audiences.

Not as meaningful for grad prospects.

Please read the following statements about RIT. Click on the underlined phrases that are MOST APPEALING to you. (select all that apply)

## Strategy Driver #2

The phrase about “right and left sides of the brain” was the least appealing within the statement. A few respondents reacted specifically to the phrase; there is a careful nuance that needs to be considered.

### Minds Full

To accomplish extraordinary things,  
to evolve as learners, excel as professionals, and  
to propel humanity forward, there must be a  
meeting of the minds, a joining of both  
the right and left sides of the brain. It's the  
sort of education that makes for well-rounded  
students and whole brain thinkers. Because  
whether a student views him or herself as a  
future artist or a scientist, in today's complex,  
multidisciplinary world, they need to be both.

“The left brain / right brain dichotomy is bad science that serious scientists do not endorse. Please do not use it.”

– Faculty/Staff

“Left brain vs right brain concept is scientifically incorrect. Please do not include it in marketing material.”

– Alum

“I like the whole thing about merging scientific/creative thinking, but I don't agree with calling it left and right brain merging. In my mind it's not using different parts of the brain, it's using the same parts differently. I picked that one because I agree with the general idea the most though.”

– Current Student

“Left brain/right brain isn't a supported theory. We shouldn't be using that in public.”

– Current Student

## Strategy Driver #2

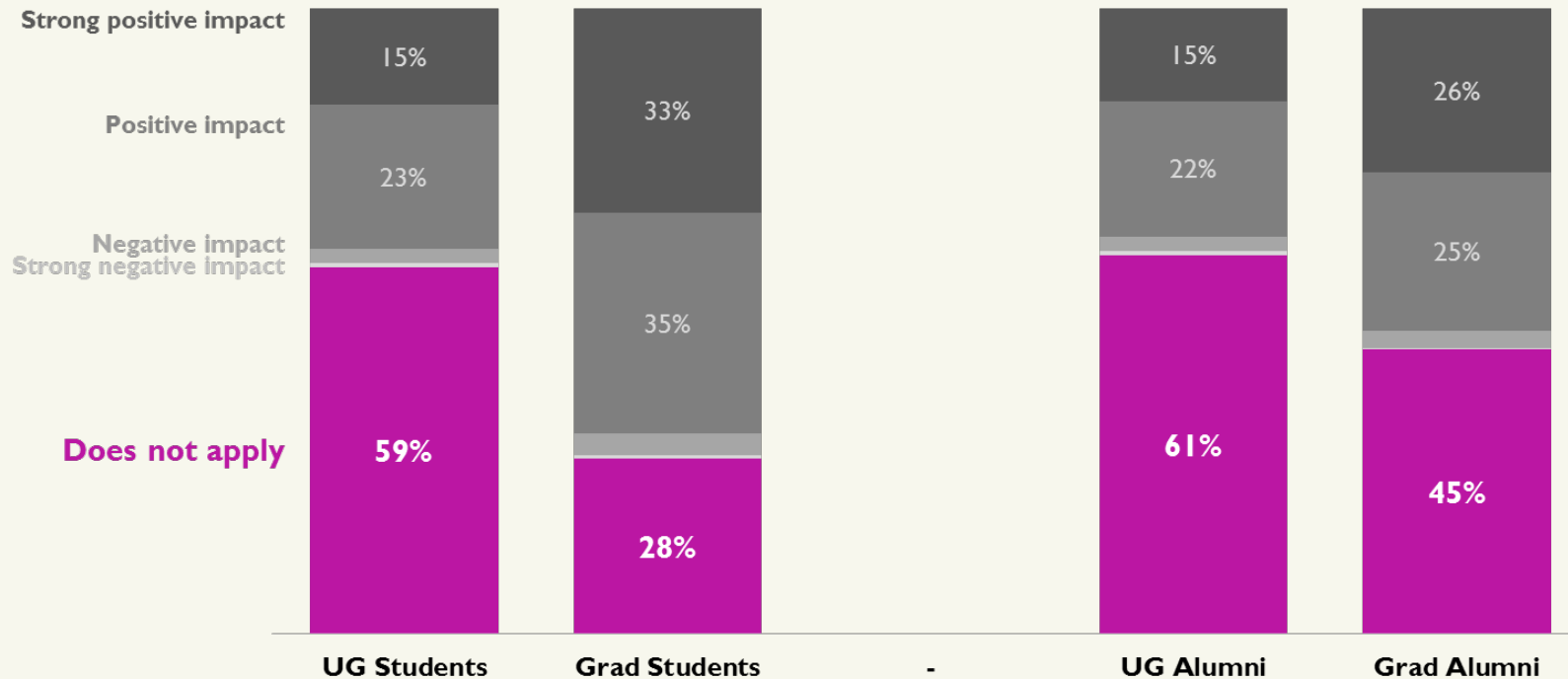
Key takeaway: There is clear agreement that the “Minds Full” statement is where RIT should place emphasis in the future. RIT excels at the cross-disciplinary, forward-looking thinking and problem solving that this statement describes. It is a unique strength and critical to the RIT brand.

**Lean into RIT's unique strength of cross-disciplinary and forward-looking thinking.**

# Strategy Driver #3

The majority of current students and alumni say that research does not apply to them.

## Impact on academic experience: Participation in conducting research

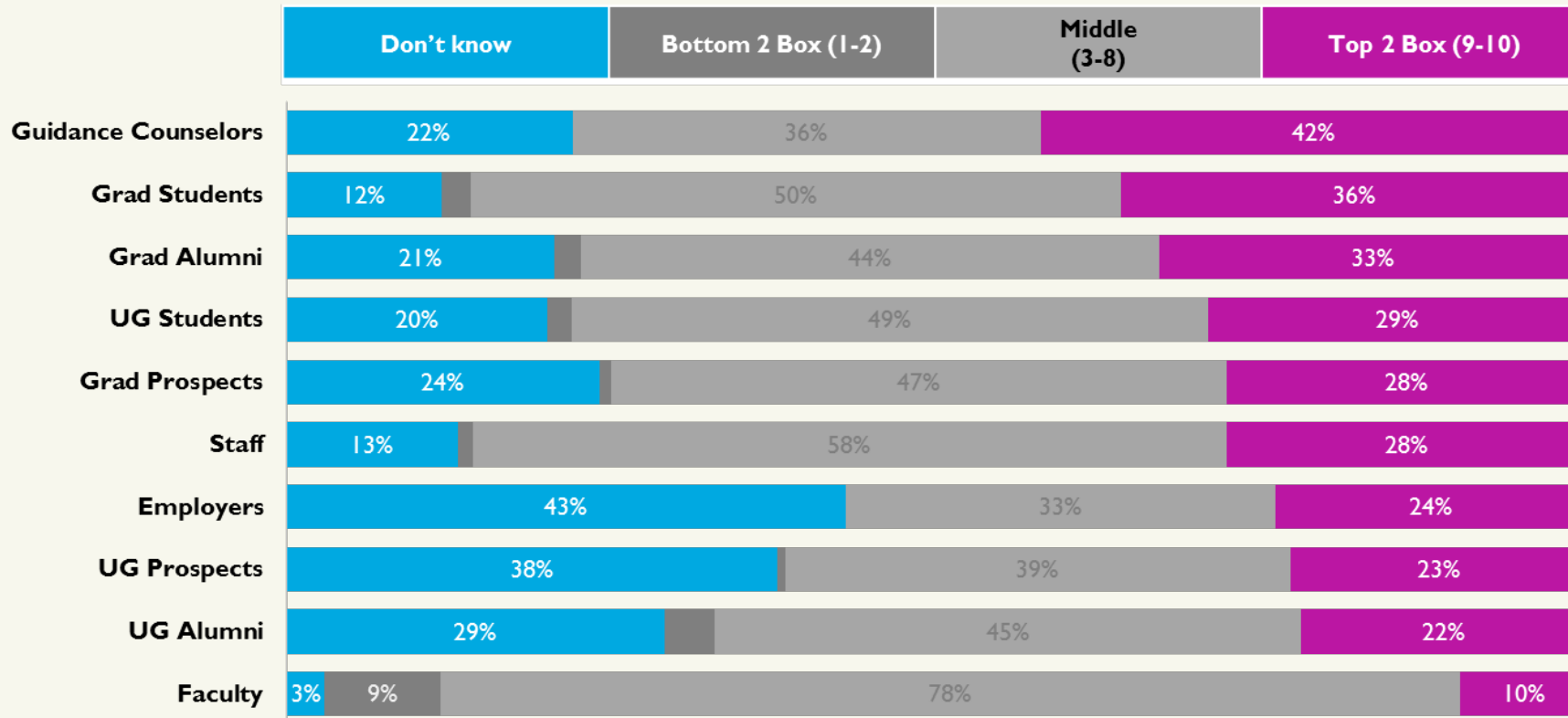


To what extent did each of the following impact your ACADEMIC experience at Rochester Institute of Technology (RIT)?  
Scale: strong negative impact/negative impact/positive impact/strong positive impact/does not apply

# Strategy Driver #3

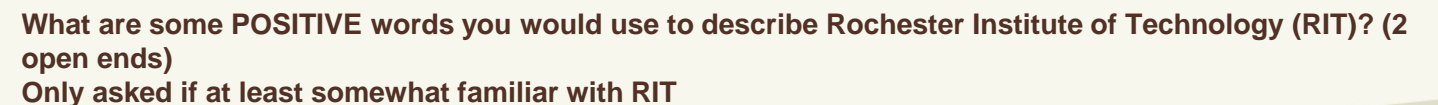
Across all audiences there is a good portion of respondents who don't know about RIT's research. Only 1 in 3 grad students and 1 in 10 faculty strongly agree with the statement.

**RIT conducts interdisciplinary, high-impact research**



Rate your level of agreement with each of the following statements about RIT  
Scale: 1=strongly disagree/10=strongly agree, 11=don't know

## Positive words used to describe Rochester Institute of Technology

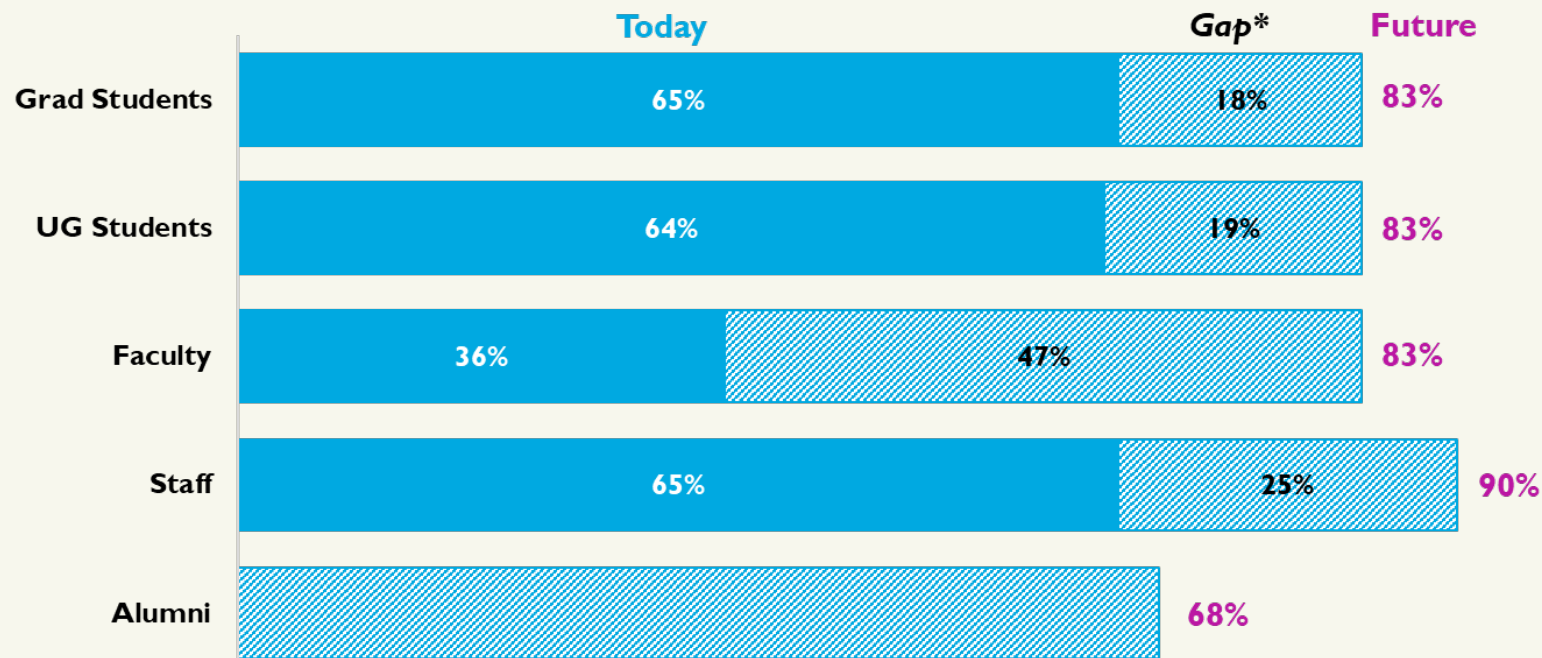


# Strategy Driver #3

However, all audiences agree that in the future RIT's research should be focused on high-impact research rather than industry needs, task oriented research.

**RIT pursues high-impact research addressing global challenges**

vs research serves needs of the industry



(FS and CS only) For each pair of statements below, select the option that you think BEST describes RIT TODAY.

(Internal audiences and alumni) For each pair of statements below, select the option that you think BEST describes how RIT should be in the FUTURE?

\*Note: Alumni only asked which statement should describe RIT in the future.



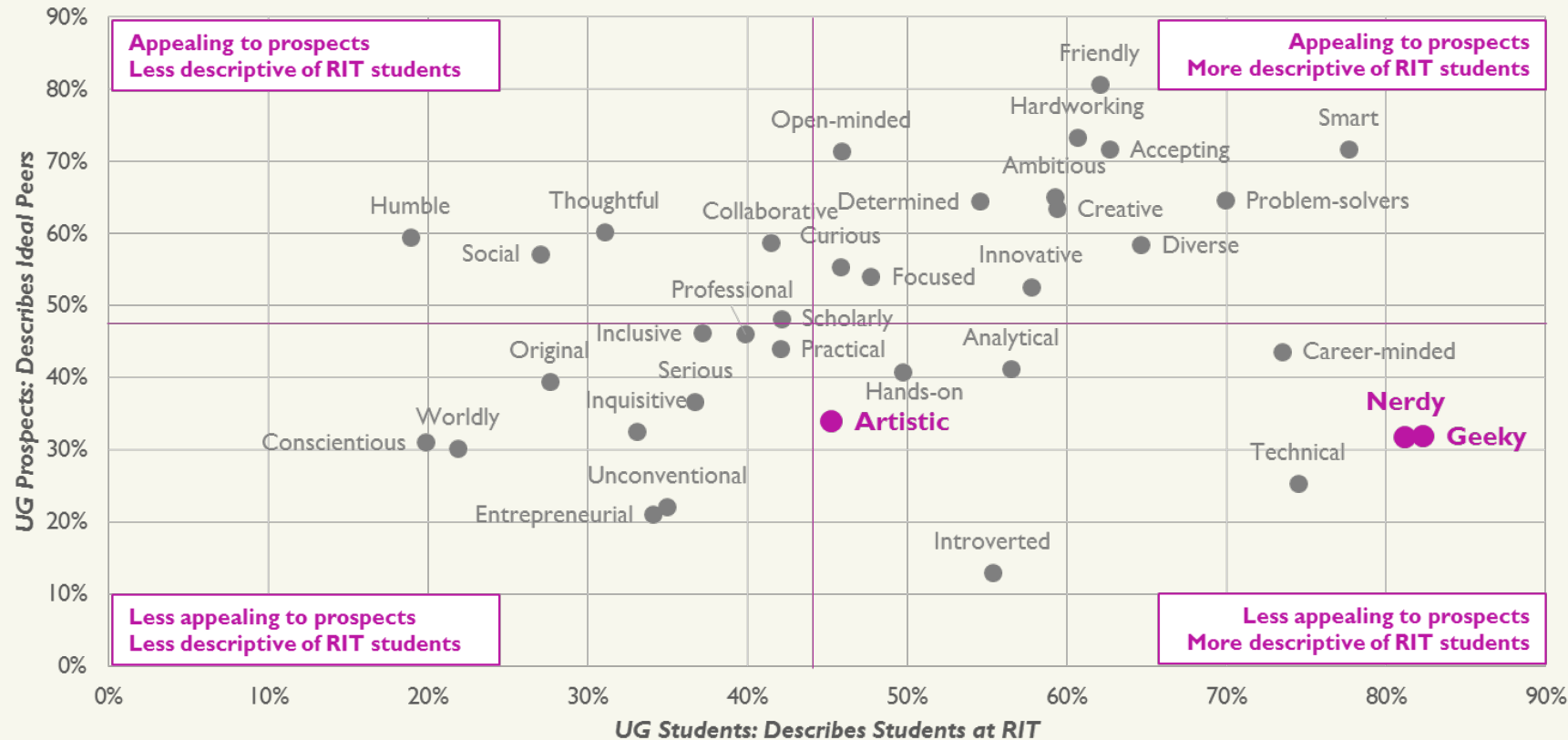
## Strategy Driver #3

Key takeaway: Both the role of research and the type of research conducted is not defined or well understood by internal or external audiences. Is it relevant for undergrad and graduate students? Should it be considered one aspect or extension of experiential learning? Is RIT conducting high-impact, global-focused research? Are faculty encouraged or required to conduct research?

**Authentically position and define what “research” is at RIT.**

# Strategy Driver #4

The terms “geeky,” “nerdy” and “artistic” resonate only with internal audiences.

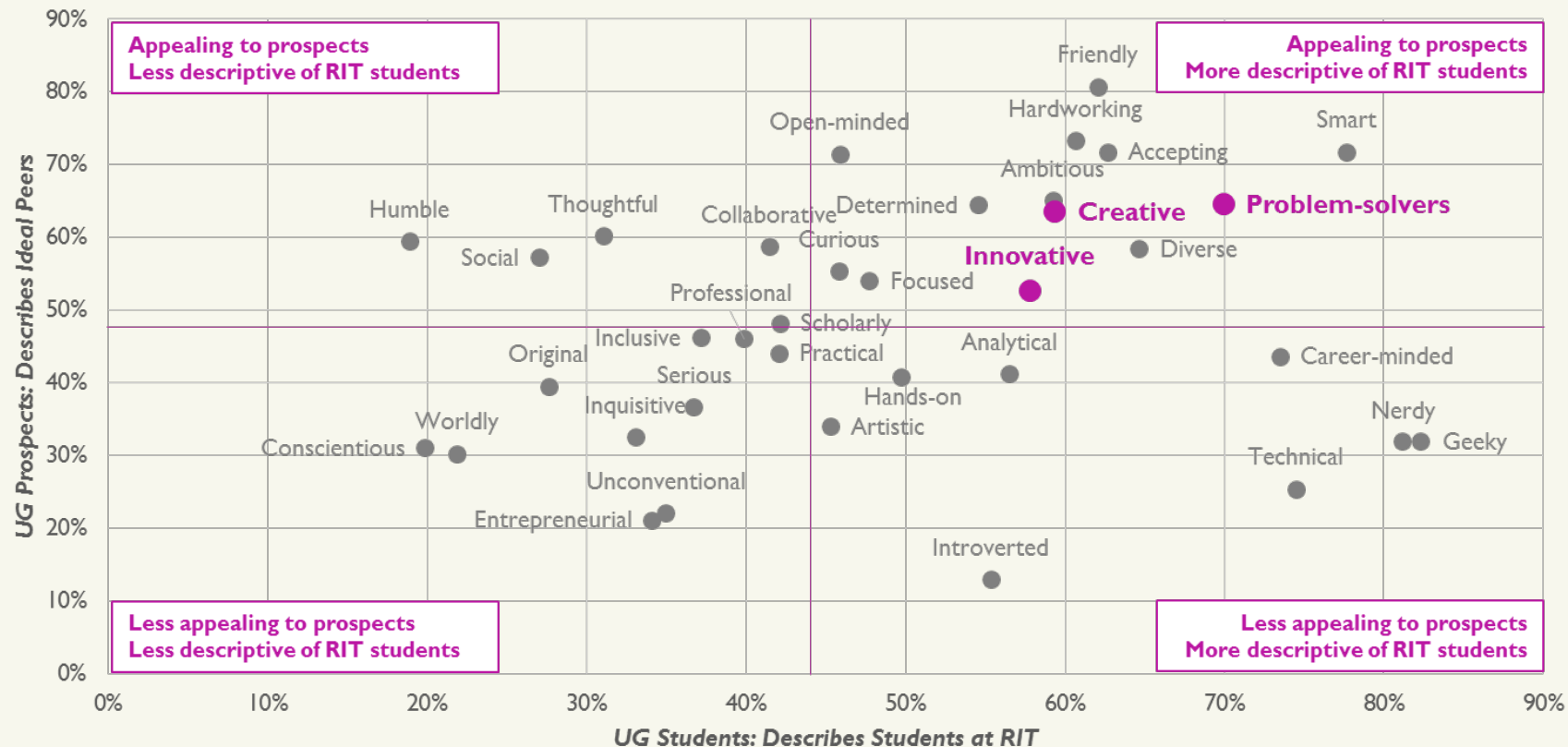


(UG Prospects) Fill in the blank: I want to go to college with students who are: \_\_\_\_\_. (select all that apply)

(UG Students) Fill in the blank: Students who attend RIT are: \_\_\_\_\_. (select all that apply)

# Strategy Driver #4

In contrast, “problem-solvers,” “innovative” and “creative” resonate both externally and internally.



(UG Prospects) Fill in the blank: I want to go to college with students who are: \_\_\_\_\_. (select all that apply)

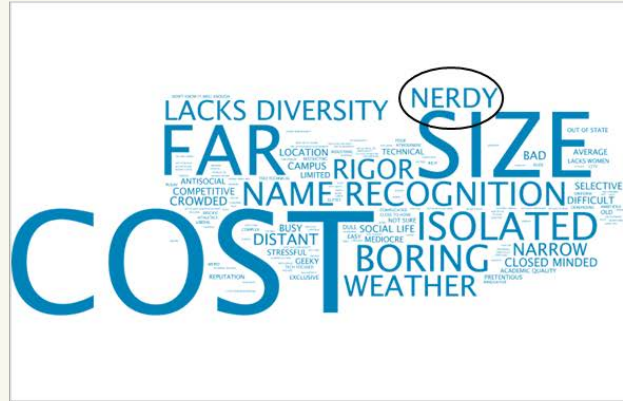
(UG Students) Fill in the blank: Students who attend RIT are: \_\_\_\_\_. (select all that apply)

# Strategy Driver #4

“Nerdy” is a top of mind unaided unappealing attribute internally and externally.

Negative words used to describe Rochester Institute of Technology

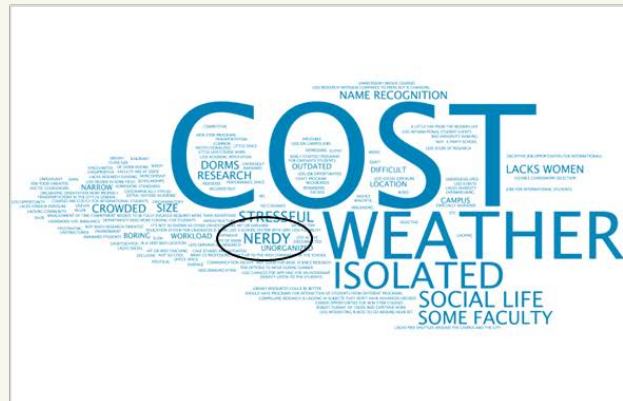
UG Prospects



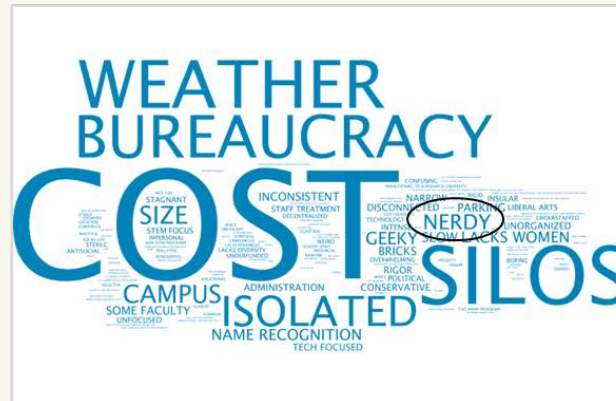
UG Students



Grad Students



Staff



What are some **NEGATIVE** words you would use to describe Rochester Institute of Technology (RIT)?

(2 open ends)

Only asked if at least somewhat familiar with RIT

## Strategy Driver #4

Key takeaway: While the terms “geeky,” “nerdy” and “artistic” resonate with some internally, these terms do not resonate with prospective students. Moreover, they do not accurately convey the culture of RIT and the position the university is continuing to shift towards.

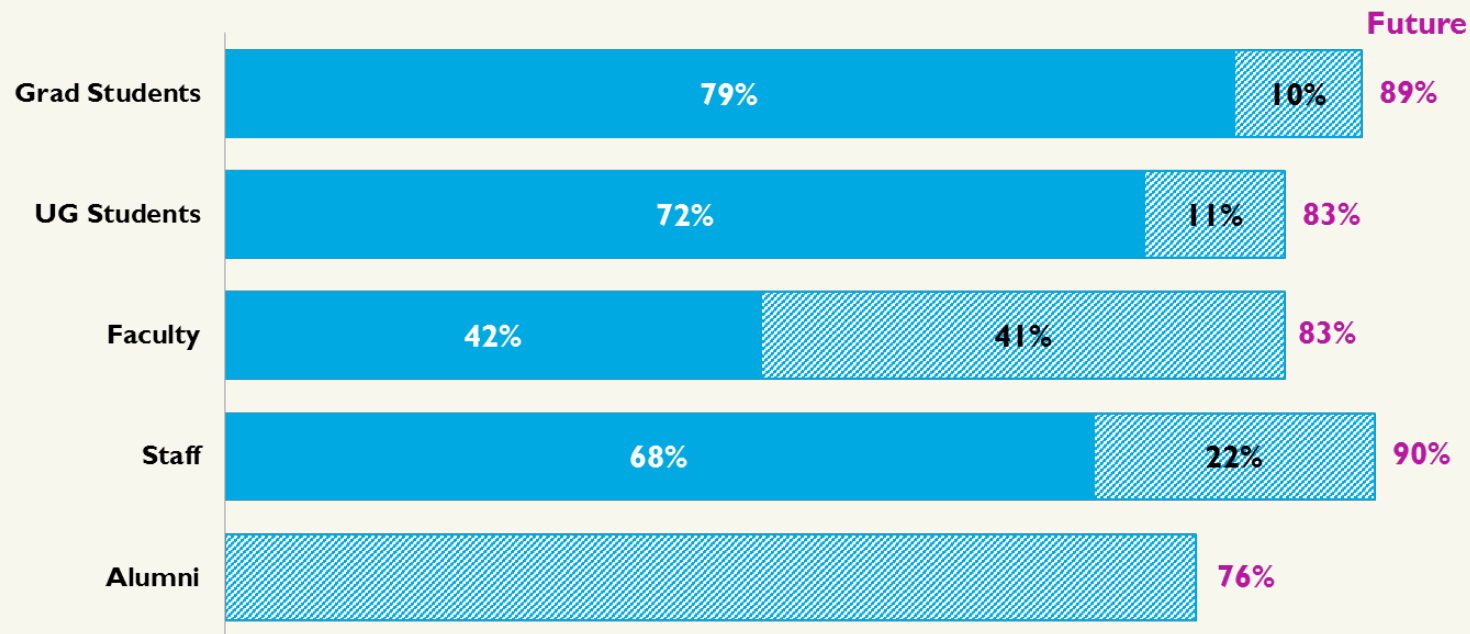
**Shift from existing social labels to terms that embody the unique and dynamic culture of RIT.**

# Strategy Driver #5

Faculty believe that workforce prep most accurately describes RIT today; however, there is consensus across all audiences where RIT should place an emphasis on the future.

**Learning encourages critical thinking, exploration and invention**

vs learning is focused on preparing for the workforce



(FS and CS only) For each pair of statements below, select the option that you think BEST describes RIT TODAY.

(Internal audiences and alumni) For each pair of statements below, select the option that you think BEST describes how RIT should be in the FUTURE?

\*Note: Alumni only asked which statement should describe RIT in the future



# Strategy Driver #5

“Innovative” is a top-of-mind unaided appealing RIT attribute both internally and externally.

Positive words used to describe Rochester Institute of Technology



What are some POSITIVE words you would use to describe Rochester Institute of Technology (RIT)? (2 open ends)

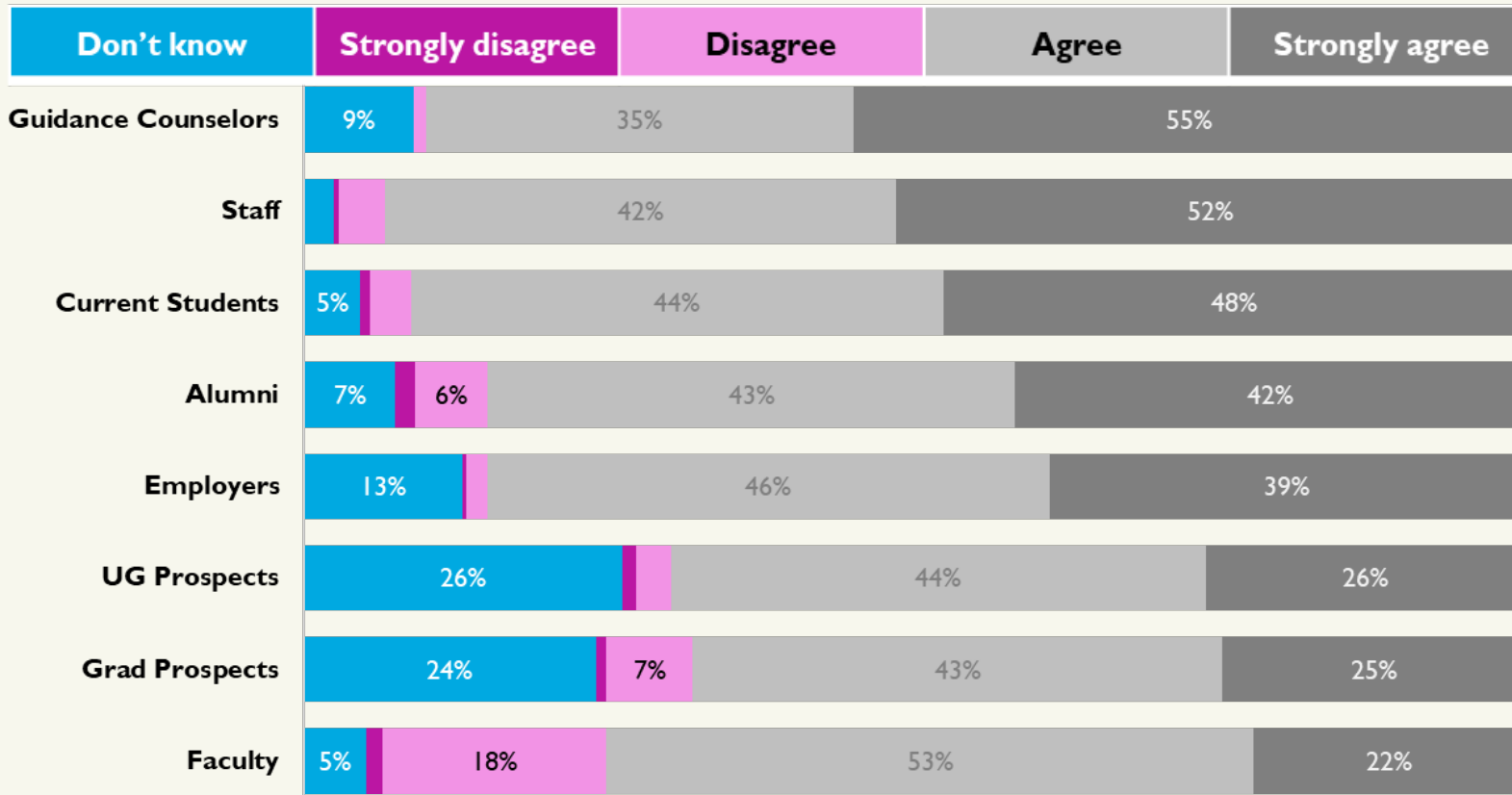
Only asked if at least somewhat familiar with RIT



# Strategy Driver #5

About 25% of prospects are unaware of RIT being a center for innovation and creativity and 1 in 4 faculty disagree or are unable to rate the statement.

**RIT is a center for innovation and creativity**



Rate your level of agreement with each of the following statements about RIT  
Scale: strongly disagree/disagree/agree/strongly agree/don't know

# Strategy Driver #5

Prospective students want to go to college with “creative” and “innovative” students. Internal audiences and alumni describe students primarily as “technical” and “career-minded” and currently identify “creative” and “innovative” as secondary descriptors.

Primary Descriptor:  
Selected by 60% or more

Secondary Descriptor:  
Selected by 40%-59%

*I want to go to college  
with students who are:*

*Students who attend RIT are: \_\_\_\_\_.*

		UG Prospects	Grad Prospects	UG Students	Grad Students	Faculty	Staff	Alumni
New Brand Associations	Creative	63%	65%	59%	55%	45%	67%	52%
	Innovative	53%	53%	58%	49%	42%	68%	54%
Existing Brand Associations	Career-minded	44%	43%	74%	67%	81%	76%	67%
	Technical	25%	39%	74%	64%	66%	78%	76%

(UG Prospects) Fill in the blank: I want to go to college with students who are: \_\_\_\_\_. (select all that apply)

(UG Students) Fill in the blank: Students who attend RIT are: \_\_\_\_\_. (select all that apply)

## Strategy Driver #5

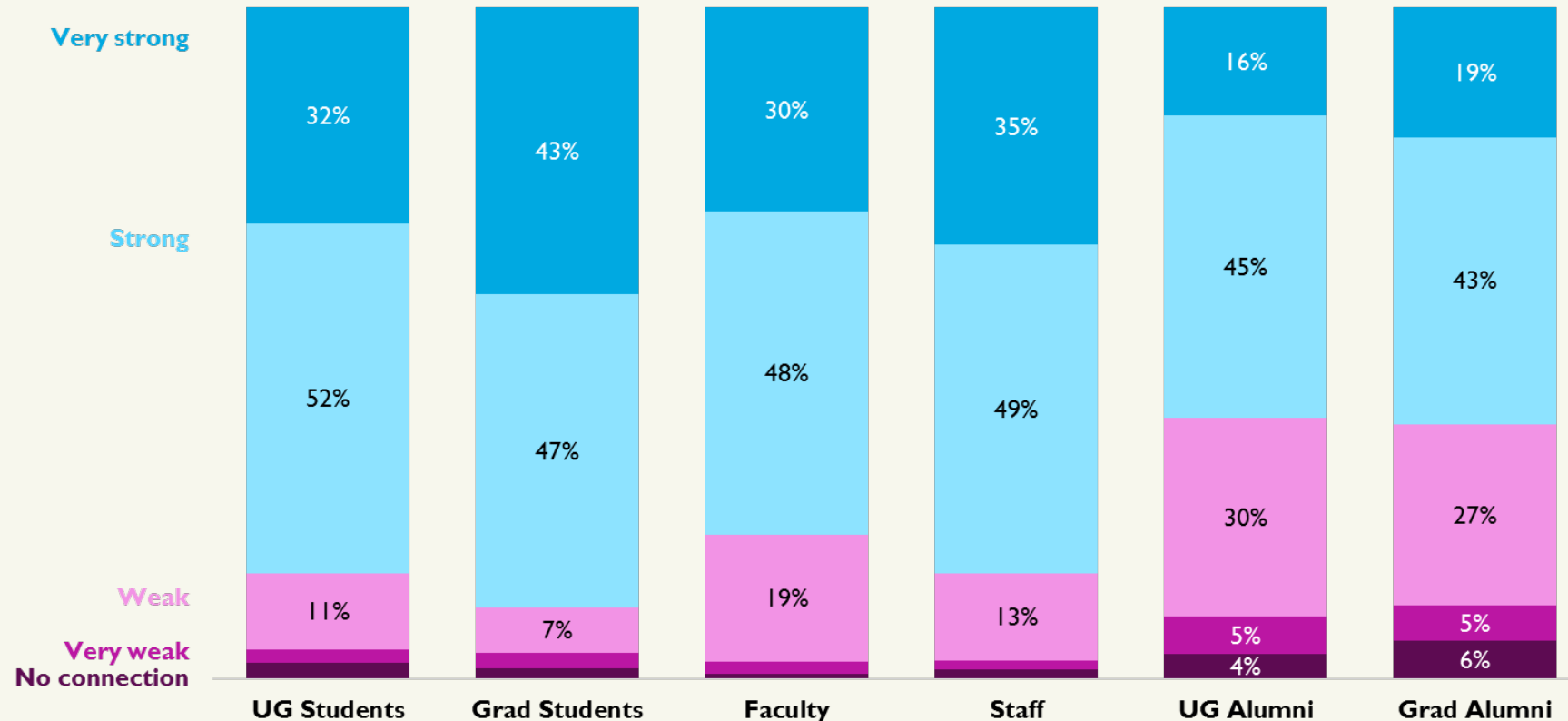
Key takeaway: While RIT has made strides to emphasize and encourage a culture of creativity and innovation, there is more work to be done to communicate this via marketing. The RIT brand and marketing tactics needs to work harder to convey and visually express creativity – from the typography, photography, tone, story selection, etc. – to continue to reposition the brand.

**Emphasize the creative and innovative culture of RIT.**

# Strategy Driver #6

Internal audiences and alumni overwhelmingly have a strong or very strong connection to RIT.

## Internal audiences and alumni: Connection to RIT



Would you say the connection you feel with Rochester Institute of Technology (RIT) is...? (select one)

Scale: very strong/strong/weak/very weak/I do not have a connection to RIT

# Strategy Driver #6

The majority of audiences are likely to recommend RIT to a prospective student. The second largest response group, those who are currently “passive,” could be moved to “promoters” with targeted marketing efforts.

	DETRACTORS						PASSIVE		PROMOTERS	
	1	2	3	4	5	6	7	8	9	10
	Recommending to UG Prospect				Recommending to Grad Prospect					
	% Detractors	% Passive	% Promoters	NPS	% Detractors	% Passive	% Promoters	NPS		
UG Students	15%	35%	50%	35	24%	20%	21%	-3		
Grad Students	11%	31%	48%	37	15%	39%	43%	28		
Faculty	22%	35%	41%	18	49%	25%	21%	-27		
Staff	9%	25%	65%	55	16%	30%	47%	32		
UG Alumni	16%	29%	54%	39	23%	25%	33%	10		
Grad Alumni	14%	29%	50%	36	15%	27%	50%	35		
Employers	6%	28%	63%	57	12%	27%	48%	36		
Guidance Counselors	9%	38%	51%	42	-	-	-	-		

## Strategy Driver #6

Key takeaway: There is an incredible amount of positive support for and connection with RIT within both the internal and external community. These audiences are familiar with RIT and are strong RIT champions.

**Activate promoters and supporters as brand ambassadors.**

# Strategy Drivers

Key takeaway: There is alignment across all audiences on the future direction of RIT; the strategy drivers below can help propel the vision forward.

- 1 Use President Munson's appointment and the brand strategy to share a vision for the university.
- 2 Lean into RIT's unique strength of cross-disciplinary and forward-looking thinking.
- 3 Authentically position and define what "research" is at RIT.
- 4 Shift from existing social labels to terms that embody the unique and dynamic culture of RIT.
- 5 Emphasize the creative and innovative culture of RIT.
- 6 Activate promoters and supporters as brand ambassadors.



# DISCUSSION



# **Embracing The Future: Disruptions in Higher Ed**

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**Provost's Town Hall**

**November 29, 2017**

**Dr. Jeremy Haefner**  
Provost and Senior Vice President  
Academic Affairs

**Dr. Neil Hair**  
Executive Director  
Innovative Learning Institute

**Dr. James Hall**  
Executive Director  
School of Individualized Study

# Market Changes

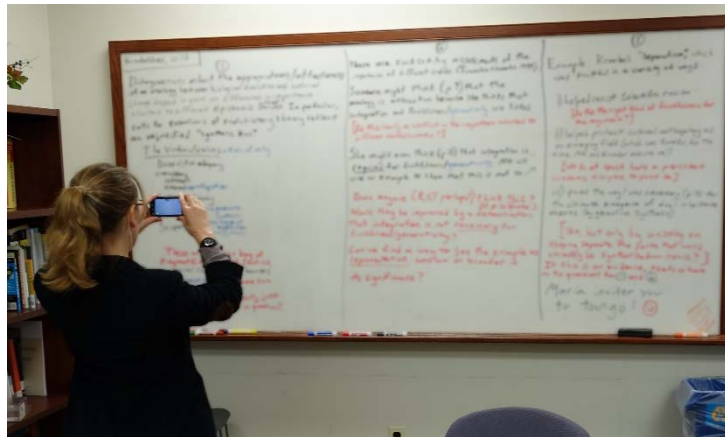
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- Demographic changes
  - Declining numbers of 18 year olds
  - Adult and returning students are largest part of the market



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**The standard model won't last**

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Northeastern University



PennState

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The Coursera logo, featuring the word "coursera" in a bold, blue, sans-serif font. The letter "c" is stylized with a circular shape.The edX logo, featuring the letters "ed" in a grey, sans-serif font, followed by a large, stylized "X" in blue. The "X" is composed of two overlapping shapes.



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**Lots of experimentation taking place – not necessarily systematic**

# Culture Changes

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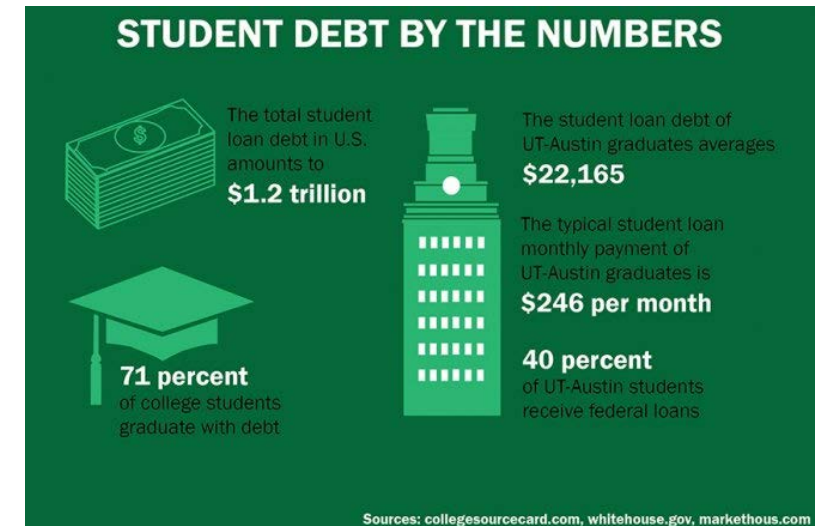
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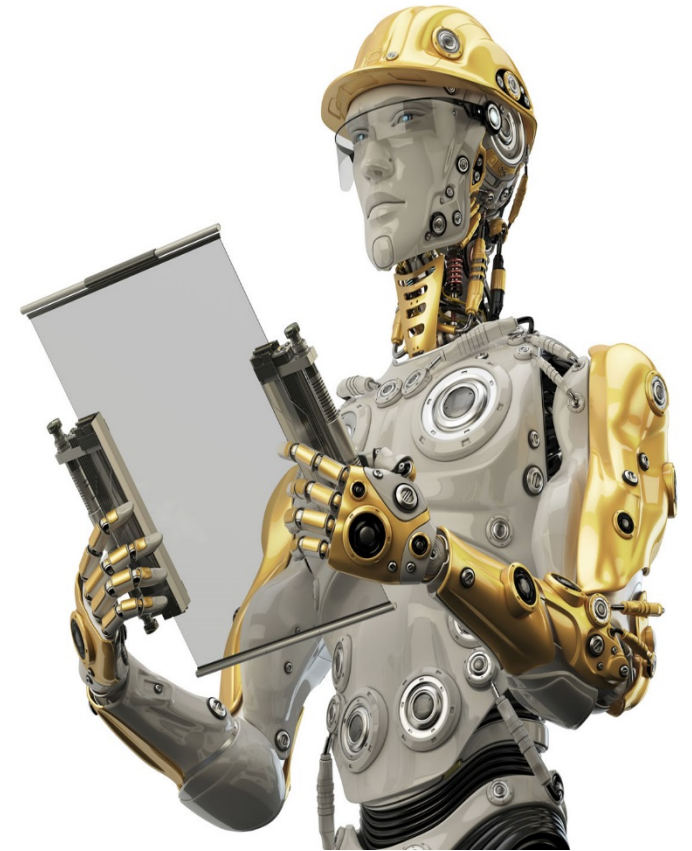
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- AI ushers in new era of PT work, extended leisure, etc.
- Changes in the political economy of reputation
  - Disruption in perception that it is worth paying a premium for certain private providers



**Brave new world**

**First time that folks have questioned our basic value**

# Are we Future-proofed?

- Completer Project
- T-shape
- Experiential Learning
- New Structures for Learning
- International campuses
- West Coast



# What else should we be doing?

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