



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

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**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

Kick-off Call & Cabinet Orientation

Monthly Check-ins

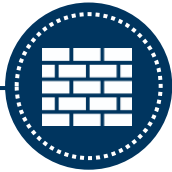
Targeted Research Recommendations

EAB Event & Roundtable Invitations

Annual Partnership Planning

The Enrollment Opportunity on Our Doorstep

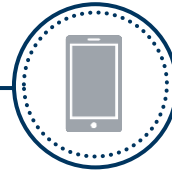
Capturing the 56 Percent of Students We Currently Lose During Onboarding



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

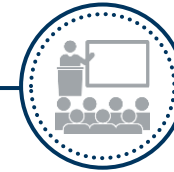
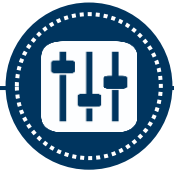


Implement support and best practice recommendations using EAB-provided materials and tools

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.

The screenshot shows the 'Academic Vital Signs' resource page from EAB. It features a header with the EAB logo and the title 'Academic Vital Signs: Aligning Departmental Evaluation with Institutional Priorities'. Below the title, there are six key areas of focus: Cost Efficiency, Enrollment Growth, Student Outcomes, Scholarship, Faculty Diversity & Inclusion, and Faculty Retention. Each area has a brief description and a list of key metrics. At the bottom, there are 'Six Principles of Departmental Evaluation' and 'Three Ways to Use This Resource'.

✓ **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



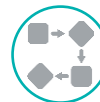
Realizing Gains from Process Improvement



Optimizing Space for the Hybrid Workforce



Managing through Metrics & Dashboards



Designing a Mission-Aligned Shared Services Model

Financial Sustainability Opportunity-Assessment Curriculum

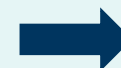
Facilitated workshops with peer cohorts



One-on-one office hours with EAB experts

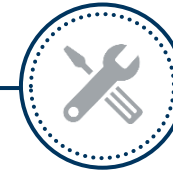
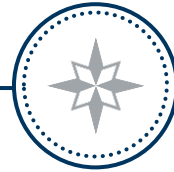


Databooks and exercises with key metrics and formulae



- Customized Prioritization Rubric
- Plan of Action and Accountability

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



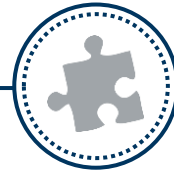
Meeting the Part-Time Student Equity Gap Head-On



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

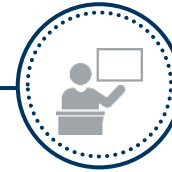
Paving a (Guided) Path to Retention and Completion



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% |
| Transfer Studies | 100 | 10% |
| Visual Arts | 100 | 10% |
| Writing | 100 | 10% |

Table 7: Liberal Arts

| Class | arts.as | arts.ab | arts.aas | 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

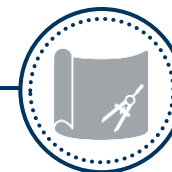
Addressing Our Students' Basic Needs as a Core Element of Our Work



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

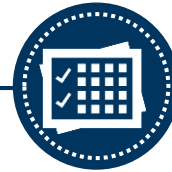


Integrating Academic and Career Development Workshop



EAB facilitated workshop guides your senior team to **scale experiential learning and incorporate meaningful career exploration in 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



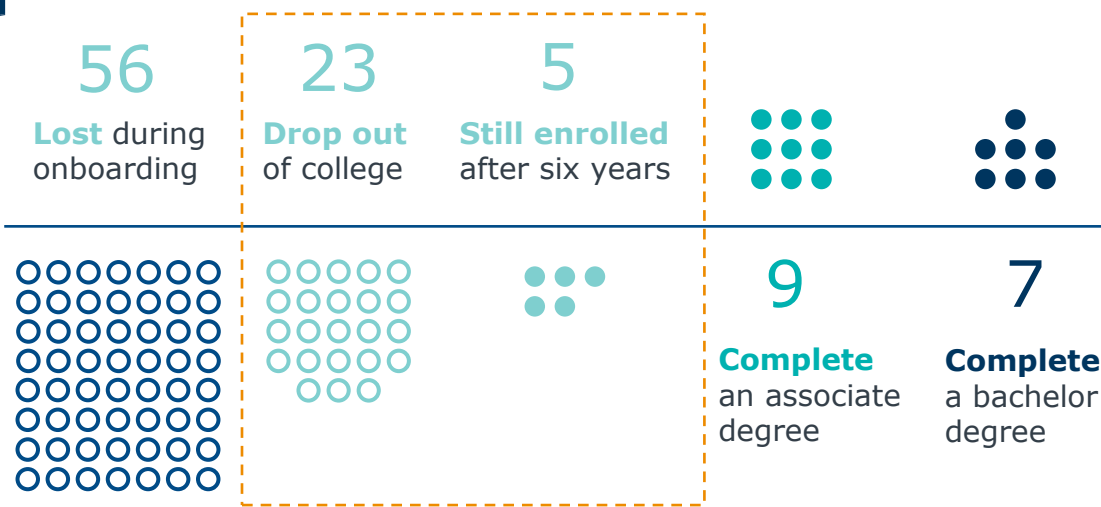
Maximize outcomes by using EAB's best practices to ensure advisors are centering conversations around **student goals rather than institutional priorities.**

- ✓ *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 | | | | | | | | | | | | | | | | |
|--|---|--|---|---|---|---|---|--|-----|---|---|---|---|-----|---|---|---|---|-----|---|---|---|---|-----|
| Reform Administrative Processes and Policies 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. | | Proactively Manage Advising Caseloads 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. | | Enroll Students in Pre-college Academic Preparation Programs 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. | | Redesign High-DFWI Milestone Course 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. | | Embed Experiential Learning in the Curriculum 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 |
| Create an Emergency Microgrant Program 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. | | Coordinate Student Support Networks 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. | | Foster Social Support and Personal Belongingness 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. | | Streamline Prerequisite and Program Requirement Pathways 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. | | Sequence Career Guidance and Exploration in Parallel to Courses 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 |
| Simplify Early Academic Planning 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. | | Formalize Student Success Accountability and Leadership 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. | | Assess Campus Climate and Prepare for Flashpoints 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. | | Encourage Pedagogical Development of Instructors 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



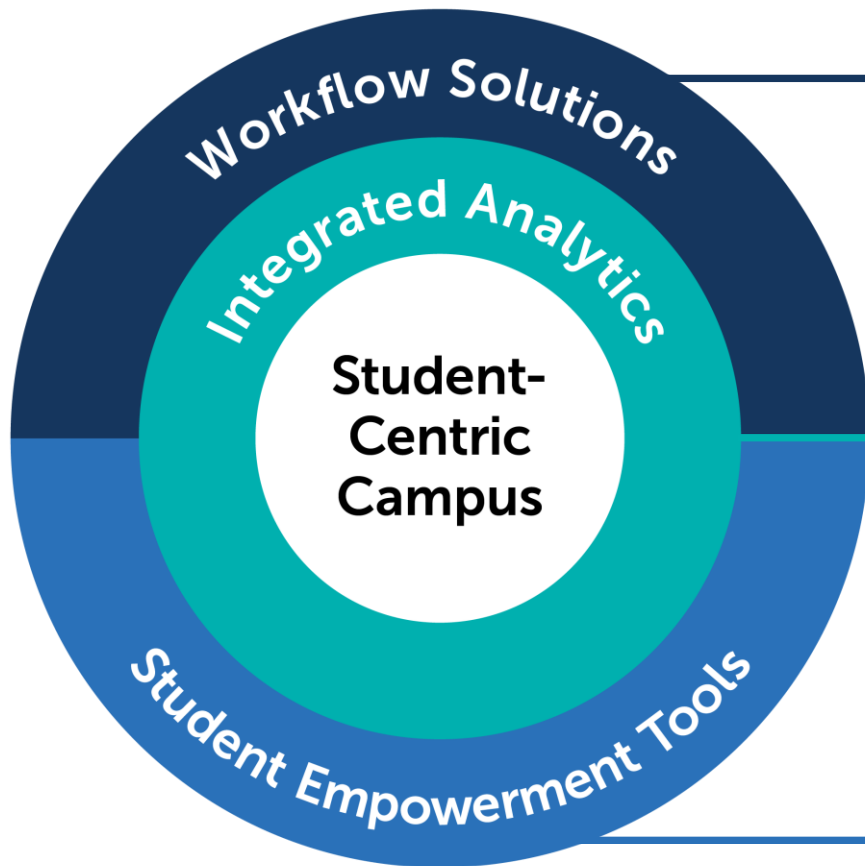
| First Year Price | Annual Increase |
|------------------|-----------------|
| \$22,500 | 3.5% |

**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 | Repeated Courses | Withdrawn Courses | Missed Success Markers |
| 2 | 1 | 0 | 3 |

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

Biology
College of Arts & Science

STUDENT ID
JH129047

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
018 | Quick Stats

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

Red Success Marker
018 | Quick Stats

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

le - Credit Completion
018 | Quick Stats

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

Appts. Made (72%)

Appointments

Select a day and time:

| | | | | |
|----|----|----|----|----|
| 23 | 24 | 25 | 26 | 27 |
|----|----|----|----|----|

11:00 am

11:30 am

2:00 pm

2:30 pm

3:30 pm

Next

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.
- Jack Whitten assigned case to Financial Aid
- 01/15 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

Cancel | Close Case

Coordinated Care Network and Early Alerts

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

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

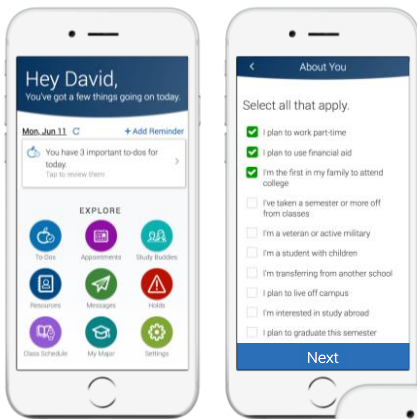
Student Engagement: Milestone Guidance

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

STUDENT EMPOWERMENT TOOLS

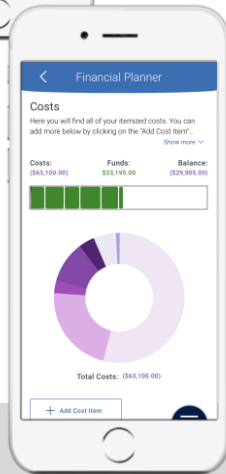
Pivotal Moments Path

Help students navigate key college milestones with timely, customized support



Financial Planner

Help students plan and budget for their college expenses

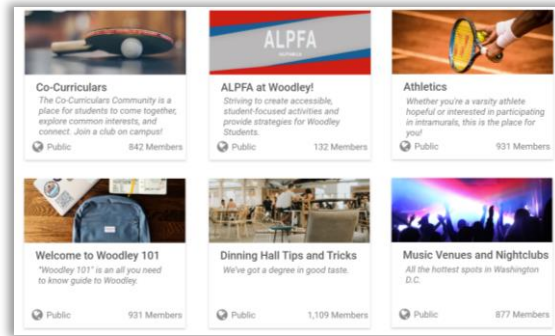


92%

Advising appointment attendance following Navigate nudging campaigns
ARAPAHOE COMMUNITY COLLEGE

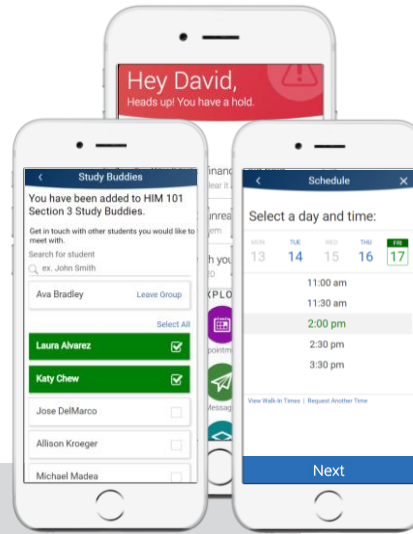
Student Communities

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

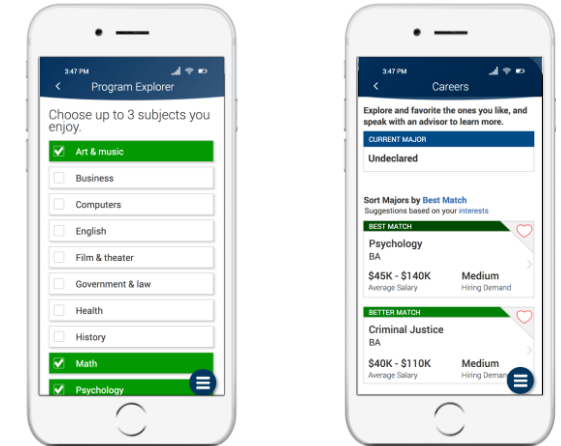


94%

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

Student Surveys

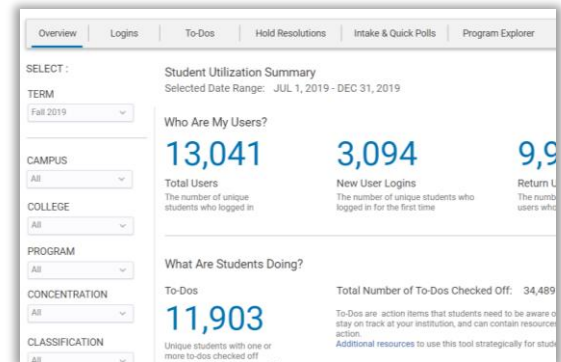
Interactive surveys and polls for new student intake, exploring majors, sharing needs and interests, and more



INTEGRATED ANALYTICS

Student Milestone Analytics

Track student behavior to measure engagement and inform interventions



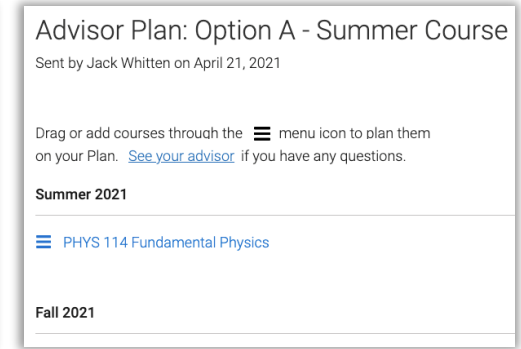
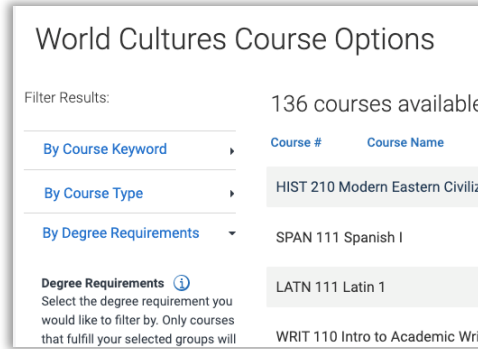
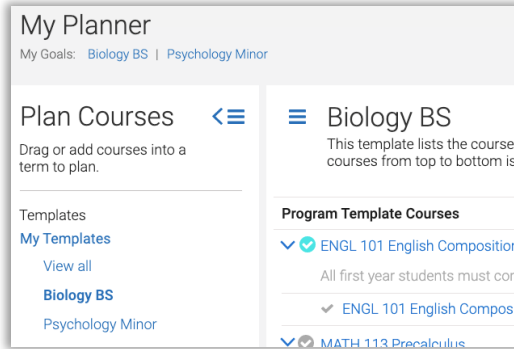
Student Engagement: Academic Planning

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

STUDENT EMPOWERMENT TOOLS

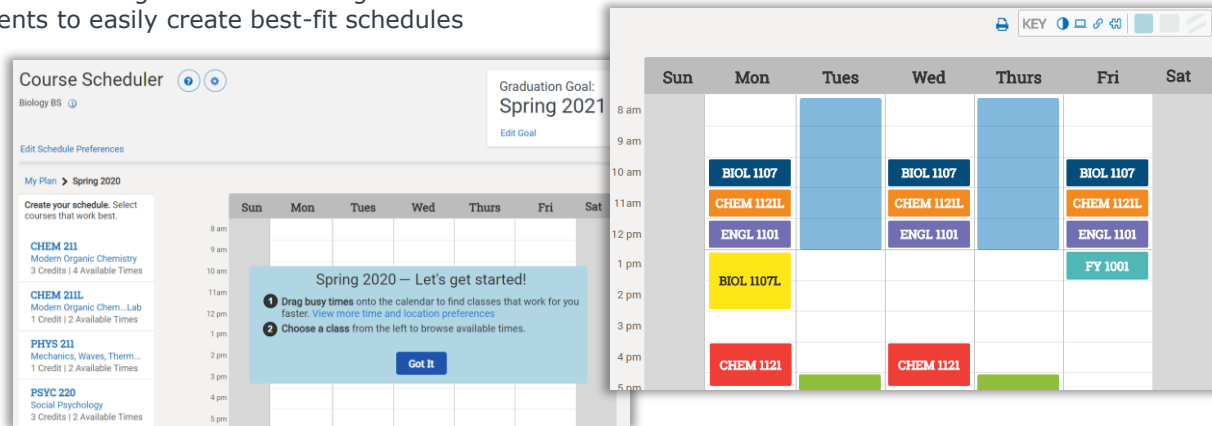
Planning Templates, Smart Search and Collaboration

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



Course Scheduling and Registration

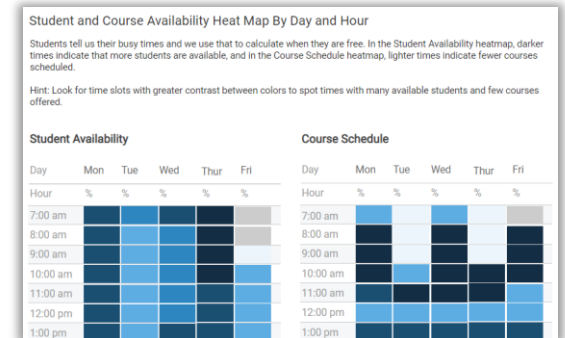
Quick scheduling and one-click registration allow students to easily create best-fit schedules



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

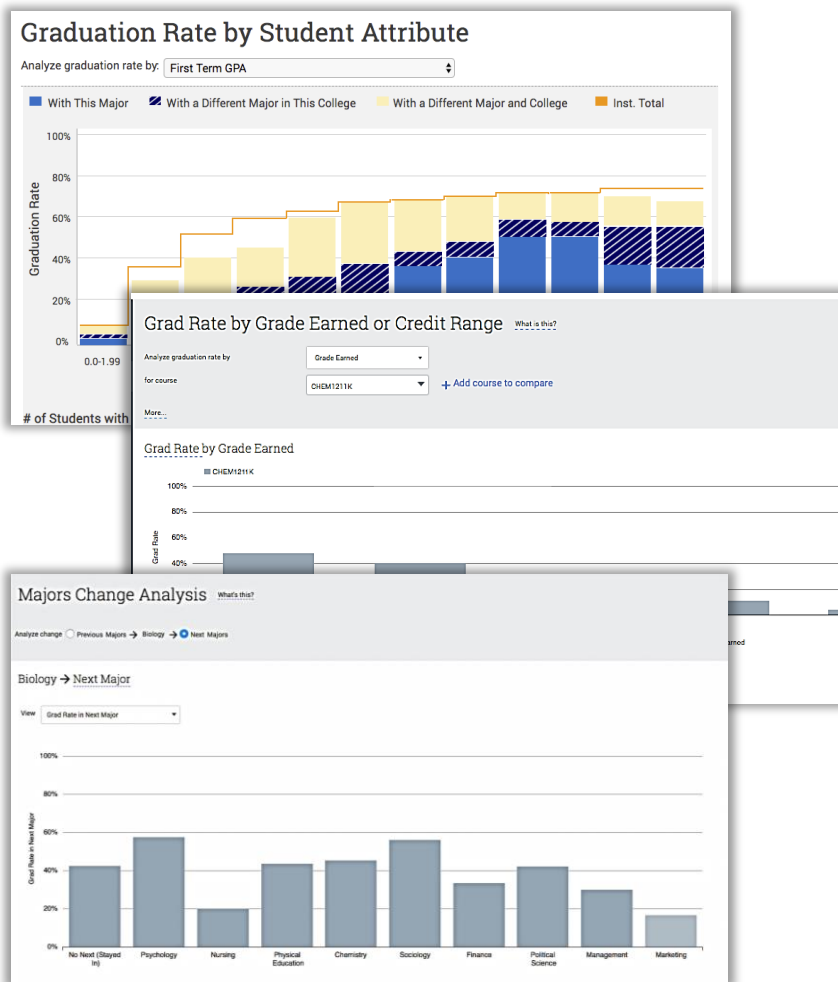
Research-Based and User-Driven Analytics Help Leaders Translate Insights into Action

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



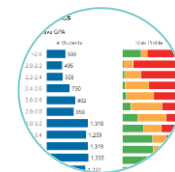
Student Success Predictive Model

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)

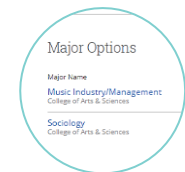
Data Outputs: Where the Platform Displays Predictive Influences



Population Health Analytics



Smart Student Profile



Program Explorer

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

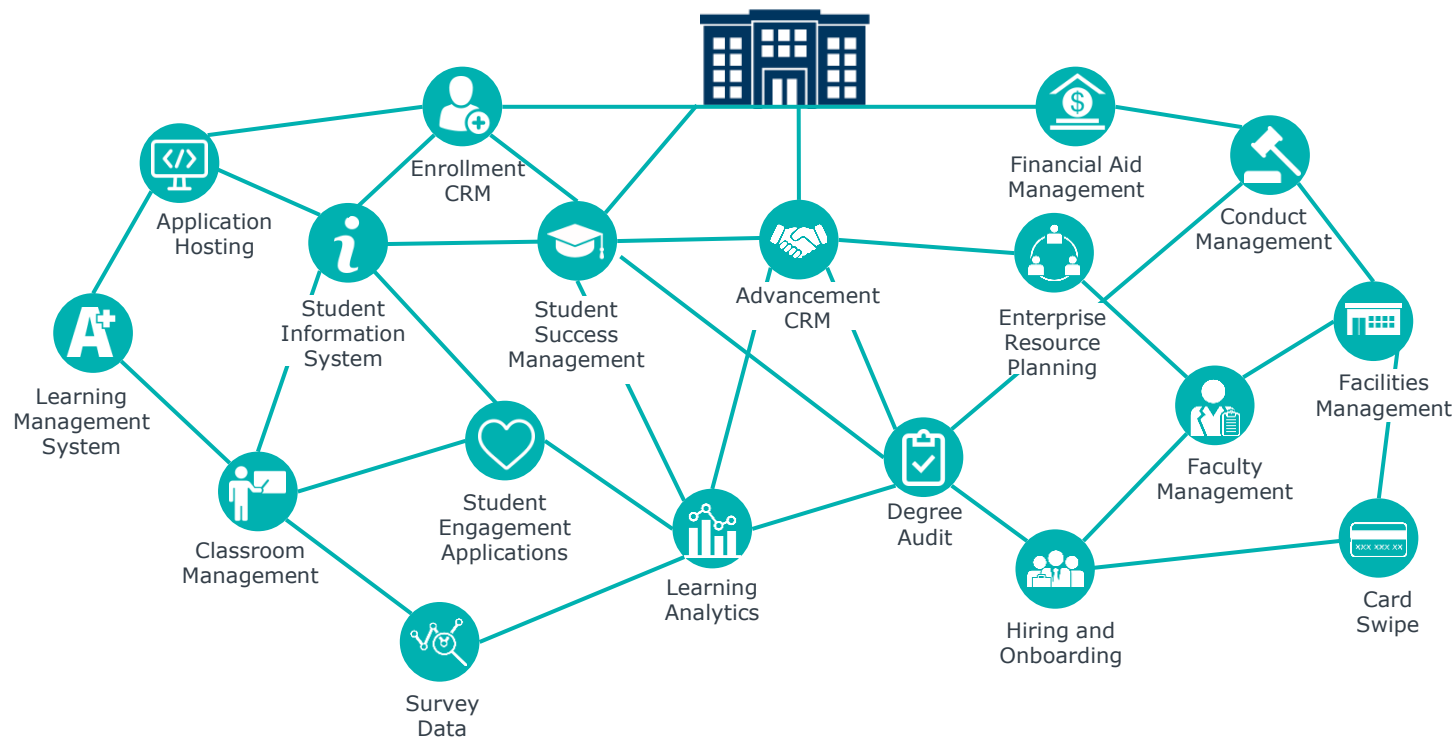


| | CORE | CORE + Milestone Guidance + Predictive Analytics | Full Student Success Management System |
|--|-------------|---|---|
| One-Time Platform Configuration | \$15,000 | \$15,500 | \$20,000 |
| Annual Fee | \$29,500 | \$44,500 | \$60,000 |

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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

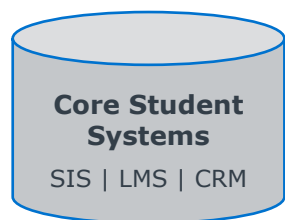
"There are five different numbers for freshman enrollment depending on who you ask."

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

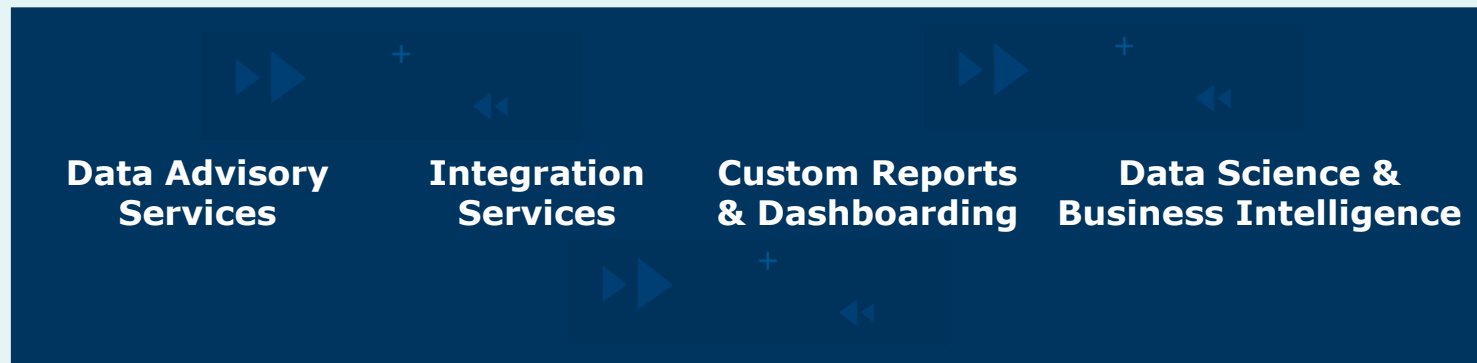
A **library of mission-specific projects** that deliver immediate value on your most pressing issues



Enabled by:

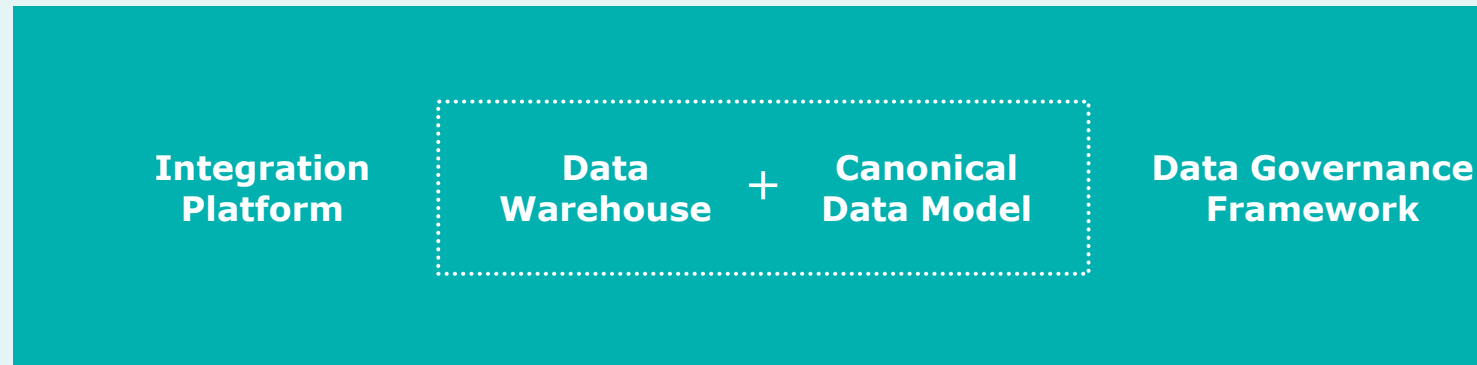
Services

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

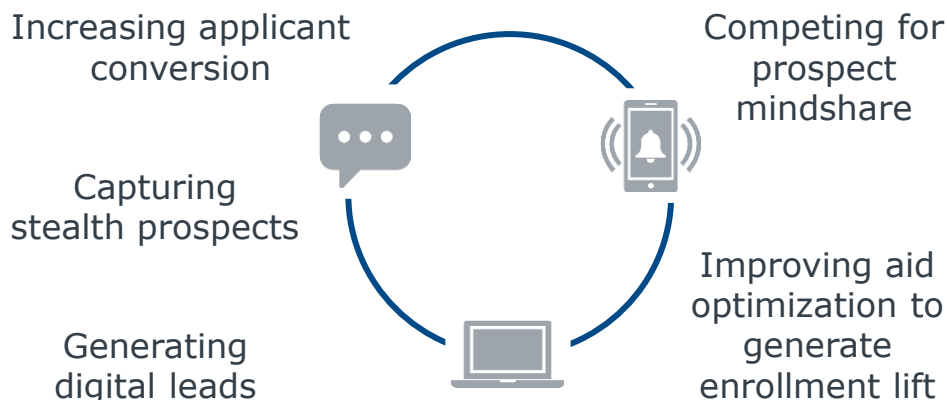
14%

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?

Strategic Enrollment Management

▶▶▶ Accelerator



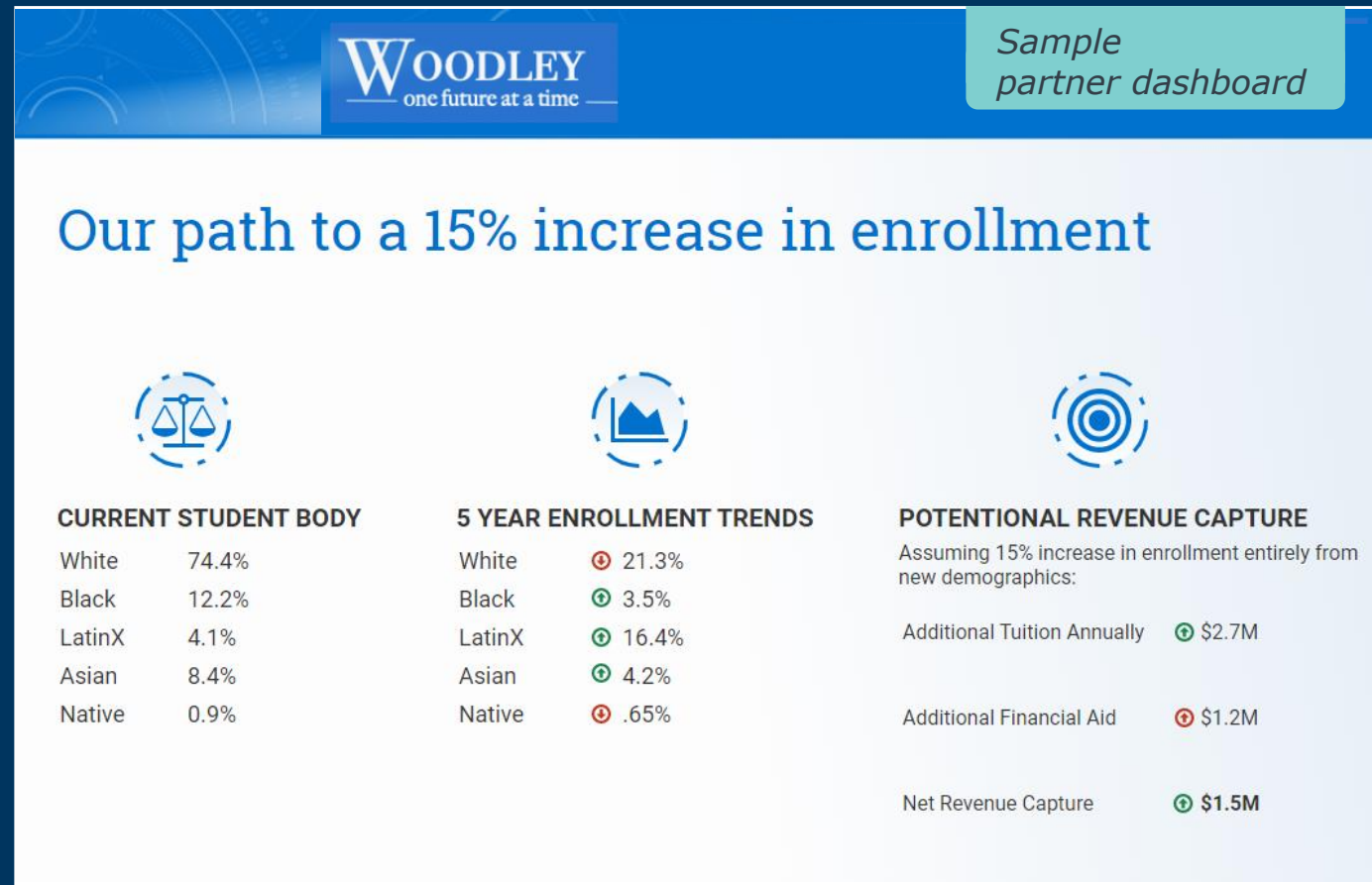
Potential Data Sources

- 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 See All |
| Oria Abel | Spring 2000 | College of Business | Advertising | Alumni | Brandee Scholz Carbrey Woods Guy Triggs Gorgi Petrov Calista Grier See All |
| Iris Abel | Spring 1992 | College of Arts & Science | Biology | Alumni | Lars Ryland Leon Leroux Tomoko Richards Dean Argyris Dror Davis See All |
| Cara Abraham | Spring 1996 | College of Creative Arts | Acting | Alumni | Su-Jin George Allison Emerald Dawn Tsukuda Todor Samuel Kathryn Pecora See All |
| Elias Adamoli | Spring 1993 | College of Arts & Science | Agricultural Studies | Alumni | Lars Ryland Farrah Aftyn Vera Terzi John Mein Rick McPhee See All |
| Elena Accardo | Spring 1994 | College of Business | Economics | Alumni | Veronica Wayne Emma Johns See All |



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 programs¹



50%

Of provosts need help establishing program review KPIs¹

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

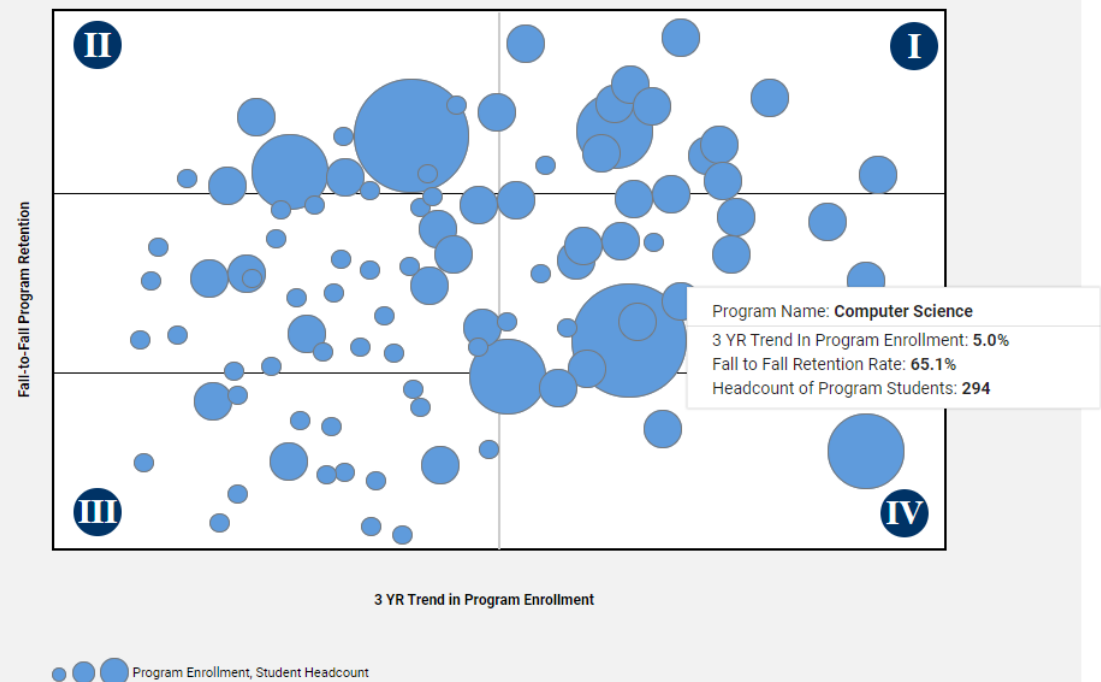


Intended Users

- 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



| | |
|--------------|---|
| | |
| Range | \$75,000 - \$250,000 Average \$155,000 |

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