



# STRATEGIES FOR THE NEW NORMAL

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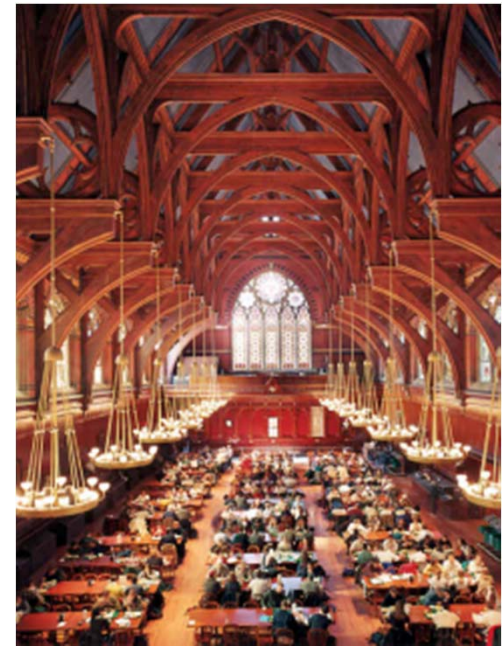


# The Great Shifts of 2008

- Wealthy private colleges (endowments > \$1 billion)
- Tuition dependent private colleges
- Flagship publics
- The regional publics
- Community colleges
- For-profit higher education

# The Wealthy Privates

- Years leading up to 2008
- Impact of huge endowment losses
- The psychological shifts
- Why these institutions have bounced back
- New strengths



# The Rest of the Privates

- Tuition dependence
- Discount rates on the rise
- Keeping up with the Joneses
- The missing men
- Selling (or leaving) the liberal arts
- New struggles as others recover

# The Flagship Publics

- Pre-2008, struggling to keep up with the privates
- Erosion of state support
- Becoming more like private institutions
- Seeking private donors
- Cheering a partial state recovery



# Regional Publics

- State role more crucial than for flagships
- Fewer options than flagships
- More students, without more money
- State funding formula disadvantages
- Cuts, larger classes, more pressure

# Community Colleges

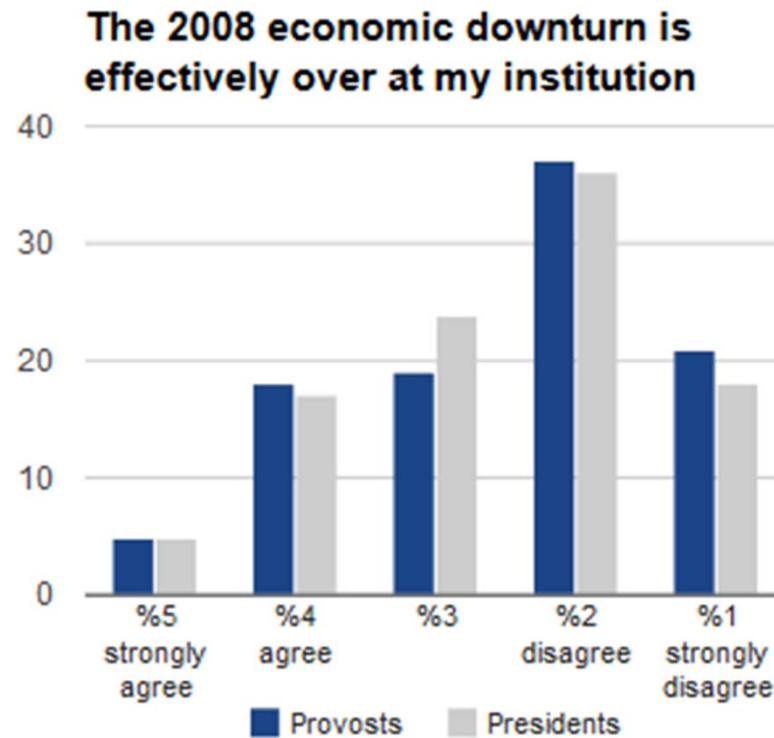
- Only sector where turning away applicants is seen as a negative
- Severe capacity issues in many states
- Enrollment spike at start of downturn
- Key role for those seeking better training for better jobs
- Huge disadvantage in resources
- End of enrollment boom



# For-Profit Higher Ed

- Initial gains as recession hit
- Nimble approach
- Capacity gaps in public higher ed
- Difficult years more recently
- Layoffs and program closures
- Debates over federal regulation

# The Downturn Isn't Over





# Common Themes Across Sectors

- Quest for (full-pay) students
  - Out of state
  - Out of country
- Competing with everyone
- Paying for new programs by cutting other programs
- Rethinking relationships with private providers
- More scrutiny from government and the public
- More attention to training for jobs
- Technology/online learning
  - As revenue generator
  - As way to provide education

# Questions?

- Your questions
- Your suggestions for future coverage



# With thanks....

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