Breakthrough Analysis of Higher Ed Cost Drivers

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Education Advisory Board

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Faculty at the Center of Higher Education’s Future Fortunes

Hard Trade-Offs in the Academy Will Determine Ability to Advance Mission in Challenging Funding Climate

No End in Sight to External Revenue Pressures

- State Support Declining
- Enrollment Growth Flattening
- Net Tuition Slowing
- Grant Proposal Yield Down

65% to 80% of Four-Year Institutional Expense Driven by Faculty Decisions

Urgency to Embrace “Smart Growth” Approaches

- Launch and Grow Profitable Programs
- Achieve Sustainability for Low-Demand Programs
- Self-Fund New Investment
- Reallocate Underleveraged Academic Resources

- Faculty Workload
- Research Startups
- Curriculum Design
- Course Offerings

Source: EAB analysis of IPEDS data
How Do We Break the Cost-Quality Trade-Off?

Mission-Advancing Resource Reallocation Compelling in Principle, Difficult in Practice

A Third of Capacity Underused

Findings from EAB Research

Course Releases
15% to 40% of FCH in service release

Small Classes
15% to 30% of classes seat < 10 students

Unfilled Sections
10% to 25% of sections statistically unnecessary

DFW Rate
10 to 25% of all attempted credits wasted

Yet Faculty Resist Calls to Change

Common Faculty Concerns

“Efficiency is just code for lower quality”

“Life-changing educational experiences will be reduced to utilization targets”

“In ten years we’ll only have pre-professional majors”

“Faculty will have to work harder for the same pay”
What Got Us Here Won’t Get Us Where We Want

Overhaul in Decision-Making Culture Needed to Ensure Resource Mismatches Don’t Recur

Thousands of Faculty Decisions Across a Decade

"We need more adjuncts if we want to remain competitive in research"

"We need a short-term study abroad program"

"If we don’t refill our open line we may as well close the department"

"We don’t have capacity to add more intro sections"

"We need more students—let’s get our courses listed as gen ed"

"It’s been five years since we increased graduate stipends…”

"We’re turning away students. Let’s expand enrollments”

"Our failure rate is high? It’s the nature of the discipline”

"We want to add more independent study options”

"We need funds to design a multi-disciplinary track with business”

"We can’t recruit top researchers unless we reduce teaching loads”

Thinking Locally, Acting Locally

• Faculty can’t see how small decisions add up to bigger picture

Little direct influence over resource allocation

Oversees portfolio with diverse mission goals and financial needs

Provost

College Deans

Department Chairs

Anthropology

Art History

Classical Studies

Economics

East Asian Studies

History

Islamic Studies

Chemistry

Philosophy

Linguistics

Biology

• Little direct influence over resource allocation

• Oversees portfolio with diverse mission goals and financial needs
What’s Holding Academic and Business Leaders Back?

Faculty-Led Change Management Essentials in Short Supply for Most

**Making the Case**

- **No Insight**
  Leaders Can’t Easily Pinpoint Problems and Opportunities

- **No Buy-In**
  Faculty Need Convincing That Change Benefit Student or Units

- **No Know-How**
  Faculty Don’t Always Know What Levers to Pull

**Taking Action**

- **No Follow-Through**
  Turnover, Sporadic Tracking Undermine Continuous Improvement

Organizational Performance
Can’t Run Just on Heroic IR Contributions

Efforts to Leverage Data Falling Short
Unsustainable Effort Needed to Get from Raw Data to Opportunity Identification to Action

A Slog
Just to Get Clean Data

Reports Don’t Answer
Critical Questions

One-Off Queries
Slow and Costly

"I stayed up til midnight poring through spreadsheets trying to make sense of the data, just for one of our five colleges. Is there a problem? How bad is it? Can we do anything about it? There’s no way I have time to do this for every single unit the way we’d want.”

Provost, Public Research University

"What’s our five-year change in enrollment?"
"Your department increased by 5%.
"Can you break that out upper-division versus lower-division?"
"Here’s the breakout, with graduate students as well.
"And average class size in lower division?"
"Average class size is 25.
"That’s way too high. Can we remove flipped classrooms?"
"We don’t track that. We’ll get back in three weeks.
"What’s the share of SCH taught by tenured versus long-term contract faculty?"
"We don’t code that faculty rank: would tenured versus adjunct suffice?"

Overstretched IR

- Time crowded out by external reporting burden
- Repetitive data requests distract from higher-value work

3-6 Weeks
Typical backlog for unit-level data queries

$10,000
Typical cost per inquiry (fully loaded)

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Standard Data Definitions

File Mapping, Cross-Walks

Data Scrubbing

Reports Don’t Answer
Critical Questions

$1Million
Minimum technical implementation cost

12-18 months
Minimum implementation timeframe

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Handful of Schools Seeing Dramatic Impact from Data Deployment

The High ROI of Getting the Right Information to the Right People at the Right Time

**Provost**

*Prioritizing Investment in Small Courses*

- Provost sets target of 12 students per course
- **IMPACT:** Percentage of courses below “breakeven” drops from 29% to 18%

**Deans and Space Committee**

*Collapsing Excess Sections*

- 289 statistically unnecessary sections consolidated
- **IMPACT:** $330K in adjunct savings; 875 tenured FCH recovered

**Curriculum Committee**

*Simplifying Curriculum to Improve Time to Degree*

- Consolidating specialty tracks eliminates 16 low-impact courses
- **IMPACT:** Six-year graduation for majors improves from 47% to 61%

**Dean, Department and Enrollment Management**

*Motivating Faculty to “Market” to Prospective Majors*

- Dean warns that, unless declines in SCH reversed, adjunct and tenured positions at risk
- **IMPACT:** Curriculum refreshed to link with higher-demand programs, majors up 40% in three years

**Departments and Student Success Committee**

*Revenue-Generating Intersession Programs*

- Accelerated courses designed around high DFW gen ed courses and upper division courses in conflict
- **IMPACT:** $500K tuition revenue split between unit and provost

**President**

*Million Dollar Savings from Deploying Entire Playbook*

- Canadian institution implements full range of capacity optimization tactics
- **IMPACT:** $1 million savings, year-after-year, with no impact on course availability or faculty workload

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**EAB Success Stories from “Smart Growth”**

- Handful of Schools Seeing Dramatic Impact from Data Deployment
- The High ROI of Getting the Right Information to the Right People at the Right Time
Creating a Transformative Data Model

Consolidated Data Warehouse

- Enrollment Data
- HR Data
- Student Data
- Finance Data
- Performance Analysis
- Forecasting Tools
- Financial Analysis
- Management Reports
Contribution Analysis

Costs are added in blocks – the key is to maximize productivity at each step prior to adding additional cost.

Focus unit managers on those areas of cost that they can control.

Incremental Instruction Cost

Full Loaded Cost

University Support

College Support

Dept. Support

Faculty
Contribution Varies Widely Across Discipline

Net Contribution per SCH

Biology: $5
Communications: $6
Economics: ($15)
English: ($29)
Management: $50
Music: ($102)
Teacher Education: $76
But Even More So by Level...

Net Contribution per SCH

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## Tools To Empower Local Managers

### Academic Forecasting Tool

#### Faculty Setup

<table>
<thead>
<tr>
<th>Faculty Summary</th>
<th>Instructional Planning</th>
<th>Instructional Planning Independent Studies/Dissertation</th>
<th>Department Summary</th>
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<tbody>
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#### Faculty Information

- **Instructor Rank Code:** Assistant Professor
- **First Name:** Mary
- **Last Name:** Smith
- **$ Current Base Salary:** 70000
- **$ Projected Faculty FTE:** 1.00
- **$ Projected Base Salary:** 70000.0000
- **$ Special Admin Comp/Summer:** 0
- **$ Summer Research:** 5000

#### Components

- **$ Other Components:** 0
- **Expected Section Taught:** 4
- **% Instruction:** 40
- **% Research:** 50
- **% Service:** 10
- **% Admin:** 0
- **% Other:** 0

#### Financials

- **% Total:** 100
- **% Class:** 10
- **$ Class:** 7000
- **$ Total Instructor Cost:** 28000
- **$ Total Research Cost:** 40000
- **$ Total Service Cost:** 7000
- **$ Total Admin Cost:** 0
- **$ Total Other Cost:** 0

#### Buttons

- Save
- View/Print Faculty Setup Excel
- View/Print Faculty Summary Excel
- Delete

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**The University of New Mexico**
New Mexico’s Flagship University
## Tools To Empower Local Managers

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<th>Row Labels</th>
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<th>Enrollment</th>
<th>Available</th>
<th>Average Class Size</th>
<th>Potential Average Class Size</th>
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The Importance of Local Understanding

Undergraduate Course Sections

Ideal Utilization

- Growth
- Consolidation
- Elimination

Special Topics
- Graduation Requirement
- Actual Opportunity
A Tale of Two Faculty Members...

Assoc. Prof Smith
$85,000

Professor Davis
$100,000
Unique Assets to Help Elevate Decision-Making Culture

Members Have Helped EAB Gain Critical Expertise in Faculty Engagement and Analytics

Extensive Best Practices on Faculty Change Management

EAB’s “Smart Growth” Research

- Smart Growth
  - Running the Academy by the Numbers

- Optimizing Institutional Budget Models
  - Strategic Lessons for Aligning Incentives and Improving Financial Performance

- Revitalizing the Program Portfolio
  - Elevating Academic Program Performance and Strategic Alignment

- Developing a Data-Driven University
  - Strategies and Best Practices for Increasing Reporting Capacity to Improve Institutional Effectiveness

Activating Data to Diagnose Problems and Pinpoint Opportunities

An 18-Month Joint Effort

A Proof-of-Concept for Department-Level Analytics

Full Access to Systems
  - Five years’ access to all ERP, SIS and Finance systems needed for integrated cost, capacity utilization and enrollment profiles

Advice from Expert Practitioners
  - Hundreds of hours with IR, IS and finance leaders mapping data architecture; with provost and deans about decision-support needs

What We’ve Learned

- High-Impact Leadership Training
- Innovative Budget Models and Incentives
- Campus-Tested Communications Strategies

What We’ve Learned

- File Maps and Extraction Scripts
- Data Dictionary and Code Crosswalks
- Key Focus Areas for Resource Realignment

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Academic Performance Solutions in Brief
Helping Members Elevate Academic Decision-Making Culture

Analytics with a Bias to Action

Data Activation
- Mapping files
- Standardizing definitions
- Data quality assurance

Our Vision: Data-Driven Insight, at Scale
- Nation’s Largest Benchmarking Database
- Single, Unified Analytical Platform
- Automated Opportunity Identification
- Drill-Down Querying Capabilities

A Foundation for Planning
- Program prioritization
- Faculty line allocation
- Enrollment growth planning
- Faculty workload and recruitment
- Course design
- Major requirements
- Absorbing funding cuts
- Quality-neutral savings opportunities
- Rightsizing section offerings
- Upper division course frequency

Guiding Decisions in the Moment
- Release time policy
- Requests for additional instructors
- Triaging student-success efforts
- Resourcing new course proposals

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How APS Will Support Academic Leadership Change Management

I  
**Launch and Opportunity Assessment**

**Loading, Categorizing, and Normalizing Your Data**
- Load ERP, SIS, and HRIS data
- Categorize and normalize college and department definitions for courses, students, and faculty workloads
- Data quality assurance and benchmarking preparation

**Opportunity Diagnostics**
- APS team conducts comprehensive analysis and opportunity sizing across academic portfolio

**Institutional Scorecard**
- APS delivers tailored report exploring institutional opportunities to isolate academic cost drivers in outlier departments, identify barriers to student success, and map enrollment trends

II  
**Enfranchising Academic Leaders**

**Dedicated Consultants**
- Dedicated staff work directly with your institution to support decision makers and identify solutions to systemic problems
- Regular check-ins and onsite visits provide rapid responses to the most pressing institutional challenges

**Academic Leadership Intensives**
- One-day, onsite educational session for academic leaders and planning/budget professionals
- Overview of APS methodology, deliverables, and “Smart Growth” academic planning approaches

**Incentive Alignment Diagnostic**
- Diagnostic based on EAB best practice work on Academic Budget models
- Identify misaligned incentives and evaluate new unit-level gainshare approached

III  
**Leveraging the Collaborative**

**National Benchmarking Summit**
- National meeting fostering networking and collaboration among cohort institutions

**Cohort Best Practices**
- Publications sharing the most innovative practices and strategies from around the Collaborative

**Expert Networking**
- Connecting you with other progressive institutions throughout the APS Collaborative

**Webconferences**
- Best practices, innovations, and training to help your staff get the most out of APS analytics
Roadmapping the First Year of Membership
Minimizing Effort for Your Staff, Maximizing Impact for Leadership

Launch
- Campus Kick-Off
  - Introducing project goals and methodology

Data Engineering
- Extraction + Validation
  - Aggregating files and cleaning data

Analysis
- Institutional Dashboard + Department Viewbook
  - Scorecarding key institution, college, and department metrics

Change Education
- Leadership On-Site + Best Practice Reviews
  - Reviewing data, reallocation opportunities, and best practices to accelerate priorities

External Benchmarking
- Annual Summits + Discipline Benchmark Reports
  - Leveraging inter-institutional insights for continuous improvement

- Academic and Business Leaders
  - Half-Day Session
- IR, Finance, IT Staff
  - ~75 Staff Hours
- Campus Project Owner
  - Weekly Status Updates
- Academic and Business Leaders
  - One-Day Session
- Provost, IR, BI
  - Ongoing

Timeframes:
- 4 months
- 6 months
- 12 months
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