• Introduction

• What is the CRC?

• Linfield College: Changing a Culture Toward Distance Education

• Case Studies in CRC Research

• Q&A
What is UPCEA CRC?

• UPCEA’s Center for Research and Consulting (CRC) was developed as a response from the membership for more market research options and guidance at a national level, but also at a local or customized level.

• The CRC has grown to 25 member institutions and 6 clients at the ad-hoc level since it was established in April 2011.
What Does the CRC Do?

- **National Research**
  - 2011 and 2012 (in planning) State Authorization Survey
  - 2011 Salary and Staffing Survey of Membership
  - 2011 Marketing Survey of Membership
  - 2012 Diversity Survey
  - Issues Research

### Median Salary over Time (in thousands)

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conferences</td>
<td>$55</td>
<td>$56</td>
<td>$58</td>
<td>$59</td>
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<tr>
<td>Exec. Educ.</td>
<td>$68</td>
<td>$68</td>
<td>$68</td>
<td>$66</td>
</tr>
<tr>
<td>Ed. Learning</td>
<td>$67</td>
<td>$70</td>
<td>$77</td>
<td>$71</td>
</tr>
<tr>
<td>Financial</td>
<td>$65</td>
<td>$60</td>
<td>$72</td>
<td>$75</td>
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<tr>
<td>Marketing</td>
<td>$64</td>
<td>$65</td>
<td>$67</td>
<td>$67</td>
</tr>
<tr>
<td>2nd in Charge</td>
<td>$84</td>
<td>$87</td>
<td>$91</td>
<td>$93</td>
</tr>
<tr>
<td>Dean/CEO</td>
<td>$127</td>
<td>$131</td>
<td>$130</td>
<td>$136</td>
</tr>
</tbody>
</table>
What are we currently doing for customized research?

• Three environmental scans for an institution’s program development for a new campus center.

• Four market concept tests of online graduate degrees.

• Re-assessing two recently launched graduate degrees.

• Assessing market potential for online non-credit programs.
The CRC Service Model

- Discounted Research
  - Custom Research
  - Industry Partner Research
  - Custom Analysis
- Demographic Service
  - Trends
  - News You Can Use
- CRC Value 2.0
  - Issues Research
    - Issue #1
    - Issue #2
    - Issue #3
  - Second Opinion
- National Studies
  - Management
  - Marketing
  - State Authorization
- Webinar
  - Diversity
  - Marketing
  - CRM
  - Etc.
Industry Partner Research

• Rather than a traditional sponsorship arrangement, UPCEA seeks mutually beneficial *partnerships* that advance the strategic interests of each organization and the field of professional, continuing and online education.

• While an Industry Partnership includes a wide variety of more conventional benefits, it also includes strategic initiatives designed to educate the market on the need for solutions such as those provided by the partner.
  – Collaboration on a study with the CRC
  – A webinar related to the outcomes of the study
Industry Partner Research

• InsideTrack
  – Collaborated on survey of members on adult student success: having an infrastructure in place that measures students retention and completion
  – Client summit occurred last month where study findings were presented.

• B Virtual Inc.
  – Collaborating on benchmark research study focusing on the need for ensuring integrity in proctoring online exams, anytime, anywhere
  – White paper and follow up Webinar to share results
Linfield College

Adult Degree Program
Overview

Linfield College, one of the first colleges in the Pacific Northwest was founded in 1858, has 2800 students and offers 47 majors through three programs:

- A residential campus in McMinnville, OR featuring traditional liberal arts and pre-professional programs.
- A Portland campus which is home to the Linfield-Good Samaritan School of Nursing, a CCNE accredited BSN program.
- The Adult Degree Program, a pioneer in adult education, offering eight of the college’s majors and four professional certificate programs online, with advisors based in Portland and McMinnville and on six community college campuses in Oregon.
Overview

- Linfield College has been offering online courses for over ten years.

- Many of Linfield's instructors were involved in the early design of online education. The flexibility of Linfield's educational programs in the Adult Degree Program allows students to complete their degree or certificate at the pace that works for them.

- Linfield’s Adult Degree Program also has relationships with community colleges throughout Oregon and Southwest Washington to help make the transition from a community college to a four year bachelor’s degree program seamless.

Bachelor’s Degree Programs
- Accounting (Online)
- Arts & Humanities
- Business Information Systems
- International Business (Online)
- Management (Online)
- Marketing (Online)
- RN to BSN (Online)
- Social and Behavioral Sciences (Online)

Minors
- Minor in Environmental Studies

Certificate Programs
- Post Baccalaureate Accounting (Online)
- Computer Information Systems
- Human Resource Management (Online)
- Marketing (Online)
Objectives

- **Understand** whether investments in improved student services and advisory processes have given Linfield a competitive.

- **Assess** the strengths and weaknesses of Linfield College's online presence and offerings.

- **Determine** what makes Linfield College the choice of those outside the Oregon borders.

- **Identify** the top reasons that adult students are choosing Linfield College to complete their bachelor’s degrees online.

- **Discover** why prospects go elsewhere and where they might go.

- **Determine** how students learn about Linfield.

- **Evaluate** the experiences of current and past students.

- **Identify** market potential, potential student needs and interests, competitive factors and positive and negative trends.
Methodology

• A survey of students, prospects and recent graduates of Linfield College was conducted from June 1 to July 31, 2011.

• Email survey: Invitation with two reminders, plus incentive.
  – Student Survey: 238 out of 458 good emails = 52%
  – Recent Graduates: 120/425 good emails = 28%
  – Recent Prospects: 143/781 good emails = 18%
Key Findings

• Could Linfield College expand it’s geographic footprint and still be able to deliver in the Linfield way?
Key Findings

Figure 12: In terms of your experience with Linfield College to this point would you say you are... (%)

- Extremely satisfied: 27% (Student: 46%, Alumni: 39%)
- Very satisfied: 52% (Student: 39%, Alumni: 52%)
- Somewhat satisfied: 20% (Student: 15%, Alumni: 13%)
- Less than satisfied: 1% (Student: 0%, Alumni: 1%)

Figure 15: In terms of your experience with Linfield College to this point would you say you are... (%) by In-State versus Out-of-State

- Extremely satisfied: 26% In-State, 33% Out-of-State
- Very satisfied: 52% In-State, 53% Out-of-State
- Somewhat satisfied: 21% In-State, 13% Out-of-State
- Less than satisfied: 1% In-State, 0% Out-of-State
The investments made to Linfield’s advising and support infrastructure were very strong, but could they be scaled?
Strengths of Linfield

- Transfer policy/Admissions: 2% of Prospects, 0% of Alumni, 9% of Students
- Size/Non-profit: 6% of Prospects, 9% of Alumni, 0% of Students
- Faculty: 17% of Prospects, 25% of Alumni, 11% of Students
- Location: 7% of Prospects, 1% of Alumni, 0% of Students
- Student support: 16% of Prospects, 11% of Alumni, 5% of Students
- Programs/Courses: 14% of Prospects, 10% of Alumni, 14% of Students
- Reputation: 25% of Prospects, 10% of Alumni, 14% of Students
- Flexibility/Convenience: 16% of Prospects, 11% of Alumni, 9% of Students
- Online: 29% of Prospects, 30% of Alumni, 37% of Students
- Adult: 10% of Prospects, 5% of Alumni, 4% of Students
- Cost: 4% of Prospects, 4% of Alumni, 5% of Students
- Other: 3% of Prospects, 5% of Alumni, 4% of Students
Potential Weaknesses of Linfield

- Bookstore: Prospects (6%), Alumni (6%), Students (6%)
- Online/Blackboard: Prospects (17%), Alumni (28%), Students (28%)
- Registration process: Prospects (1%), Alumni (6%), Students (11%)
- Instructors: Prospects (11%), Alumni (18%), Students (21%)
- Program/Class offerings: Prospects (15%), Alumni (20%), Students (26%)
- Support/Advising: Prospects (11%), Alumni (17%), Students (21%)
- Program/Class quality: Prospects (3%), Alumni (12%), Students (9%)
- Cost: Prospects (34%), Alumni (13%), Students (13%)
- Other: Prospects (4%), Alumni (6%), Students (2%)
• Determine the target market for the Adult Degree Program. Initiate process to achieve state authorizations within target market.

• Expand online registration to include all students in Adult Degree Program to reach convenience-based, off-hours audience.

• Establish instructor training for online faculty, and enroll first group by fall 2012.
Case Studies of the CRC
Research Objectives

• Situation
  – New dean and associate dean
  – No clear information on trending and student need and satisfaction

• Objectives:
  – Market potential
  – Student needs/interests
  – Competitive factors
  – University strengths, weaknesses and opportunities in the region

Figure 8: In terms of your experience with Chatham University to this point would you say you are... (%)
Key Findings

- Many of the programs align with occupational professionals that are high growth/high volume or manageable competitive situation

<table>
<thead>
<tr>
<th>Table 2: Occupational Statistics, Growth and Competition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Occupational Area</strong></td>
</tr>
<tr>
<td>-----------------------</td>
</tr>
<tr>
<td>Physician Assistant</td>
</tr>
<tr>
<td>Management Occupation</td>
</tr>
<tr>
<td>Writers (editors, tech., writers, authors)</td>
</tr>
<tr>
<td>Physical/Occupational Therapists, Asst., Aides</td>
</tr>
<tr>
<td>Physical Therapists</td>
</tr>
<tr>
<td>Occupational Therapists</td>
</tr>
<tr>
<td>Primary, secondary special educ. teachers</td>
</tr>
<tr>
<td>Kindergarten</td>
</tr>
<tr>
<td>Elementary</td>
</tr>
<tr>
<td>Middle School</td>
</tr>
<tr>
<td>Secondary</td>
</tr>
<tr>
<td>Special education</td>
</tr>
<tr>
<td>Architects</td>
</tr>
<tr>
<td>Biochemist, Biophysicists, Chemists</td>
</tr>
<tr>
<td>Landscape Architects</td>
</tr>
<tr>
<td>Psychologists</td>
</tr>
<tr>
<td>Art and Design Occupations</td>
</tr>
<tr>
<td>Food Scientists</td>
</tr>
</tbody>
</table>

<sup>*</sup>Demographics/Alteryx
<sup>**</sup>BLS Occupational Handbook 2010
<sup>***</sup>BLS Occupational Handbook 2008-2018 Projections
Key Findings

- No clear market leadership position; no clear differentiation or leading, promoted benefit
Key Findings

- While the colleges perform adequately overall, there is room for improvement on all customer contact factors.
Data-Driven Decisions for Chatham

• Reassessed the marketing position of CGS and CCPS to leverage clear strengths & differentiating factors of the institution

• Developed an integrated marketing plan taking into account advertising & promotion, customer relations management, branding and e-marketing
  – New VP of marketing joined Chatham in 2012
    • Using research findings to guide upcoming efforts
    – Implemented e-marketing efforts

• Comprehensive review of CRM system at institutional level to ensure proactive and progressive

• Revised advising and student support processes and services
Other Cases
Other Cases

• Stopping it before it happens ...

• Major market study to re-establish continuing education department

• Re-aligning the marketing department

• Engaging the faculty through environmental scanning
Special Requests
Special Requests

• What US institutions have campuses overseas?

• What is the average revenue or size of non-credit operations?

When I run some really fast numbers on the UPCEA data set, I get average gross revenues of 10 million, of which roughly 3.025 mill is from non-credit. I’ve calculated the average net revenue to be $528,631. Therefore, net revenue is 17%.

• Are the other schools of liberal arts positioning themselves differently in terms of non-credit business education and training?

Alliant International University
American College
American University
Baruch College
Benedictine College
Boston University
Carnegie Mellon
City University of Seattle
Clark University
Columbia University
Cornell University
Duke University
Embry-Riddle
Emerson College
Endicott College
Farleigh Dickinson University
Florida State University
George Mason University
Georgetown University
Georgia Institute of Technology
Hellenic American University
Ithaca College
Johns Hopkins University
Loyola University Chicago
Massachusetts Institute of Technology
McDaniel College
National Louis University
New York University
Northwestern University
Ohio University
Parsons School of Design
Rochester Institute of Technology
Rockford College
Schiller International University
St. John’s University
St. Louis University
Stanford University
Suffolk University
Syracuse University
Temple University
Texas A&M
Toledo College
Towson State University
Trinity College
University of Chicago
University of Dallas
University of Dayton
University of Evansville
University of Indianapolis
University of Maryland - College Park
University of Nevada, Las Vegas
University of Northern Virginia
University of Phoenix
Virginia Tech University
Virginia Commonwealth University
Webster University
Yale University
### How much should I spend on marketing?

#### Recent Analysis of Larger UPCEA Institutions, Those With More Than $30M in Gross Revenues Allocate 5.5% to Marketing

<table>
<thead>
<tr>
<th>Gross Revenues</th>
<th>$34,516,523.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing Salary</td>
<td>$705,822.00</td>
</tr>
<tr>
<td>Media</td>
<td>$771,499.00</td>
</tr>
<tr>
<td>Salary/Gross Revenue</td>
<td>2.04%</td>
</tr>
<tr>
<td>Media/Gross Revenue</td>
<td>2.24%</td>
</tr>
<tr>
<td>Outsourcing</td>
<td>0.70%</td>
</tr>
<tr>
<td>Operations</td>
<td>0.52%</td>
</tr>
<tr>
<td>Total Spent on Marketing</td>
<td>5.51%</td>
</tr>
</tbody>
</table>

#### Figure 19: Number of Marketing Staff by Revenue Size
(Average When They Had this Person on Staff)

<table>
<thead>
<tr>
<th>Revenue Size</th>
<th>Full-time Staff</th>
<th>Part-time Staff</th>
<th>Marketing Director</th>
<th>Marketing Associate/Manager</th>
<th>E-marketer</th>
<th>Web Developer</th>
<th>Graphic Designer</th>
<th>Copywriter</th>
<th>Editor</th>
<th>Broadcast</th>
<th>B2B</th>
<th>Media</th>
<th>Market Researcher</th>
<th>Public Relations</th>
<th>Marketing Support</th>
<th>CRM</th>
<th>Call Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 million or less</td>
<td>4.40</td>
<td>1.69</td>
<td>0.91</td>
<td>0.93</td>
<td>0.55</td>
<td>0.91</td>
<td>0.20</td>
<td>0.54</td>
<td>0.65</td>
<td>0.00</td>
<td>0.10</td>
<td>0.50</td>
<td>0.20</td>
<td>0.54</td>
<td>0.73</td>
<td>0.70</td>
<td>0.65</td>
</tr>
<tr>
<td>5.1 million to 15 million</td>
<td>3.33</td>
<td>2.07</td>
<td>1.05</td>
<td>1.23</td>
<td>0.69</td>
<td>1.28</td>
<td>0.40</td>
<td>0.37</td>
<td>0.58</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.40</td>
<td>0.37</td>
<td>0.53</td>
<td>0.75</td>
<td>0.58</td>
</tr>
<tr>
<td>More than 15 million</td>
<td>11.04</td>
<td>2.62</td>
<td>1.10</td>
<td>2.31</td>
<td>1.36</td>
<td>1.43</td>
<td>1.18</td>
<td>1.60</td>
<td>1.23</td>
<td>5.10</td>
<td>5.00</td>
<td>5.00</td>
<td>0.91</td>
<td>1.60</td>
<td>0.89</td>
<td>1.06</td>
<td>1.23</td>
</tr>
<tr>
<td>Total</td>
<td>5.89</td>
<td>2.12</td>
<td>1.02</td>
<td>1.63</td>
<td>0.96</td>
<td>1.12</td>
<td>0.65</td>
<td>1.13</td>
<td>0.92</td>
<td>4.14</td>
<td>2.75</td>
<td>2.75</td>
<td>0.65</td>
<td>1.13</td>
<td>0.75</td>
<td>1.06</td>
<td>0.92</td>
</tr>
</tbody>
</table>

#### Marketing as a percentage of Gross Revenues

<table>
<thead>
<tr>
<th>Institution</th>
<th>Average of 7 Research 1 Institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing as a percentage of gross revenues</td>
<td>4.94%</td>
</tr>
<tr>
<td>Salary as a percentage of gross</td>
<td>1.44%</td>
</tr>
<tr>
<td>Media as a percentage of gross</td>
<td>3.49%</td>
</tr>
<tr>
<td>Operating Budget</td>
<td>0.00%</td>
</tr>
</tbody>
</table>
### Where’s the (Marketing) Money?

<table>
<thead>
<tr>
<th></th>
<th>5 million or less</th>
<th>5.1 million to 15 million</th>
<th>More than 15 million</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average CE Gross Revenues</td>
<td>$2,712,788</td>
<td>$9,878,788</td>
<td>$34,516,523</td>
<td>$13,839,798</td>
</tr>
<tr>
<td>Median Stated Marketing</td>
<td>$300,000</td>
<td>$400,000</td>
<td>$879,163</td>
<td>$360,000</td>
</tr>
<tr>
<td>Average Stated Marketing Budget</td>
<td>$299,280</td>
<td>$410,600</td>
<td>$1,796,696</td>
<td>$718,912</td>
</tr>
<tr>
<td>Average Budget for Salaries</td>
<td>$154,838</td>
<td>$143,778</td>
<td>$705,822</td>
<td>$368,760</td>
</tr>
<tr>
<td>Average Budget for Media</td>
<td>$155,277</td>
<td>$260,969</td>
<td>$771,499</td>
<td>$364,760</td>
</tr>
<tr>
<td>Average Budget for Operating</td>
<td>$29,700</td>
<td>$28,286</td>
<td>$180,514</td>
<td>$79,671</td>
</tr>
<tr>
<td>Average Spent on Freelance Staff</td>
<td>$6,416</td>
<td>$8,531</td>
<td>$39,948</td>
<td>$15,448</td>
</tr>
<tr>
<td>Average Spent on Ad Agency</td>
<td>$22,716</td>
<td>$57,458</td>
<td>$139,057</td>
<td>$62,555</td>
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<tr>
<td>Average Spent on Research</td>
<td>$6,205</td>
<td>$10,625</td>
<td>$64,074</td>
<td>$22,639</td>
</tr>
<tr>
<td>Average Percentage for Salaries</td>
<td>6%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Average Percentage for Media</td>
<td>6%</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Average Percentage for Operating</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Average Percentage Spent on Freelance Staff</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Average Percentage Spent on Ad Agency</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Average Percentage Spent on Research</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Average Calculated Marketing Budget %</td>
<td>14%</td>
<td>5%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Average Stated Marketing Percentage of Gross Revenue</td>
<td>11%</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Questions??
Contact Information

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