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DESIGNING THE FUTURE OF
INDEPENDENT HIGHER EDUCATION

Trends Leading to Strategic Responses to Enrollment Shifts

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RNL is Here for a Reason = You!



1,900 campuses and nonprofits work with us each year



3,000 institutions have partnered with us in our history



300 new clients started working with us last year



240 million emails sent to prospective students and donors annually



20 million communications mailed for our clients



6 million phone conversations with students and alumni



\$2 billion in institutional aid optimized for our campus partners



\$1 billion+ generated in philanthropic commitments for our clients

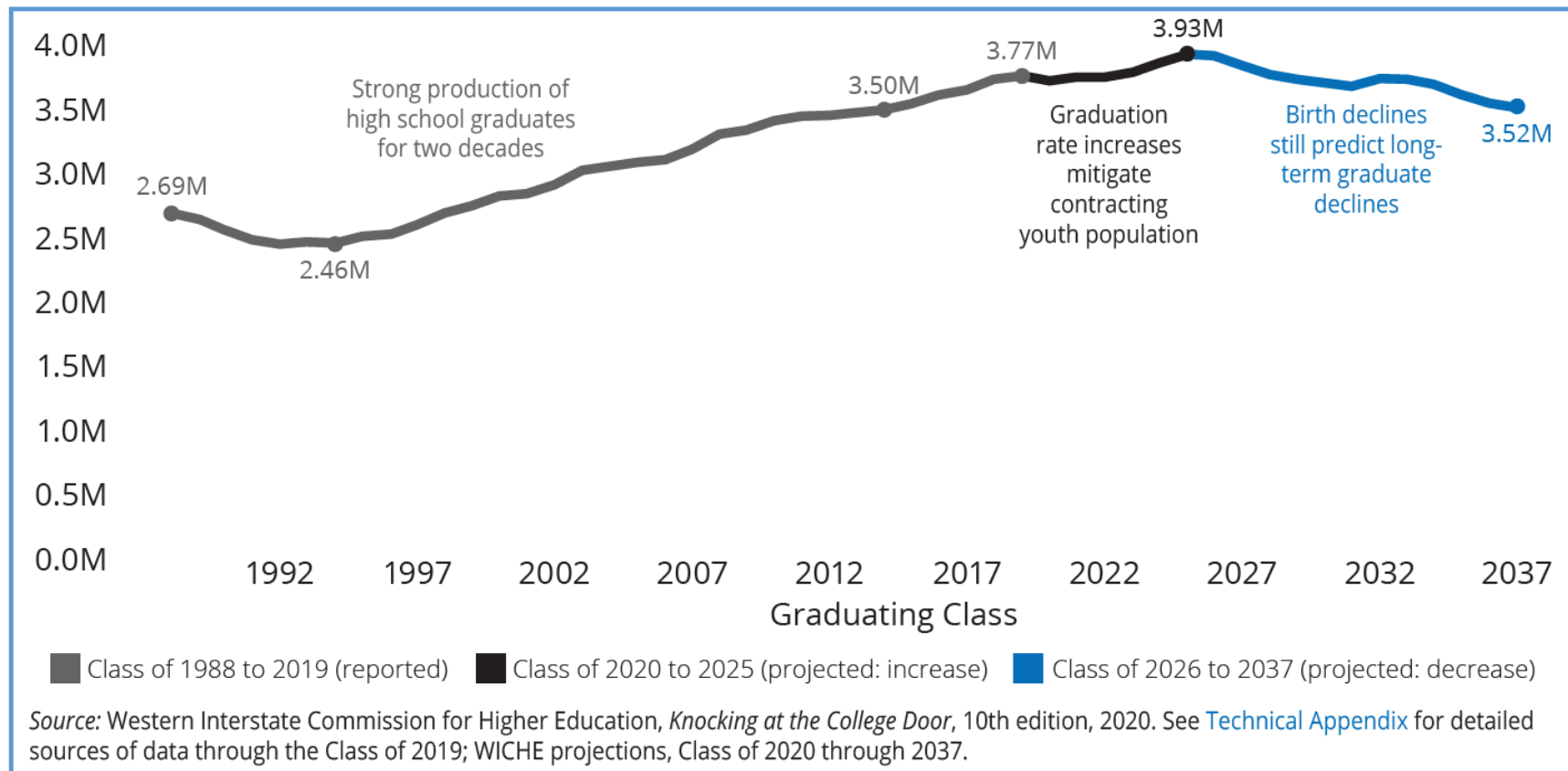


\$200 million raised each year using our multichannel fundraising solutions

A photograph of three young people, likely students, looking at a document together. The image is overlaid with a solid blue filter. The person in the center is a young woman with curly hair, smiling broadly. To her left is a young man in a dark jacket, also smiling. To her right is another young man in a plaid shirt, looking down at the document. The text 'Enrollment Landscape' is centered over the image in a white, sans-serif font.

Enrollment Landscape

Figure 1. Slowing Growth in Number of U.S. High School Graduates, then Decline (U.S. Total High School Graduates)

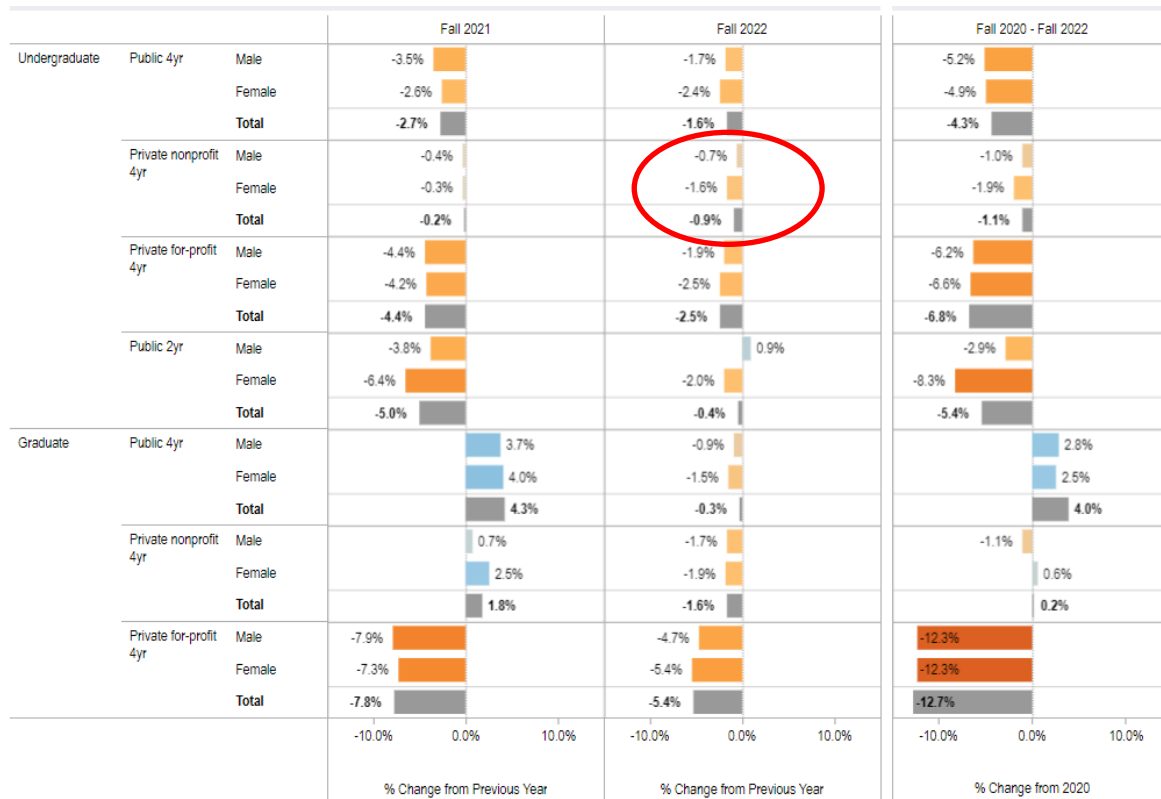


First-Time enrollment was flat in 2021, Private Non-Profit, up 2.9% (down 41K since 2015, -10%)

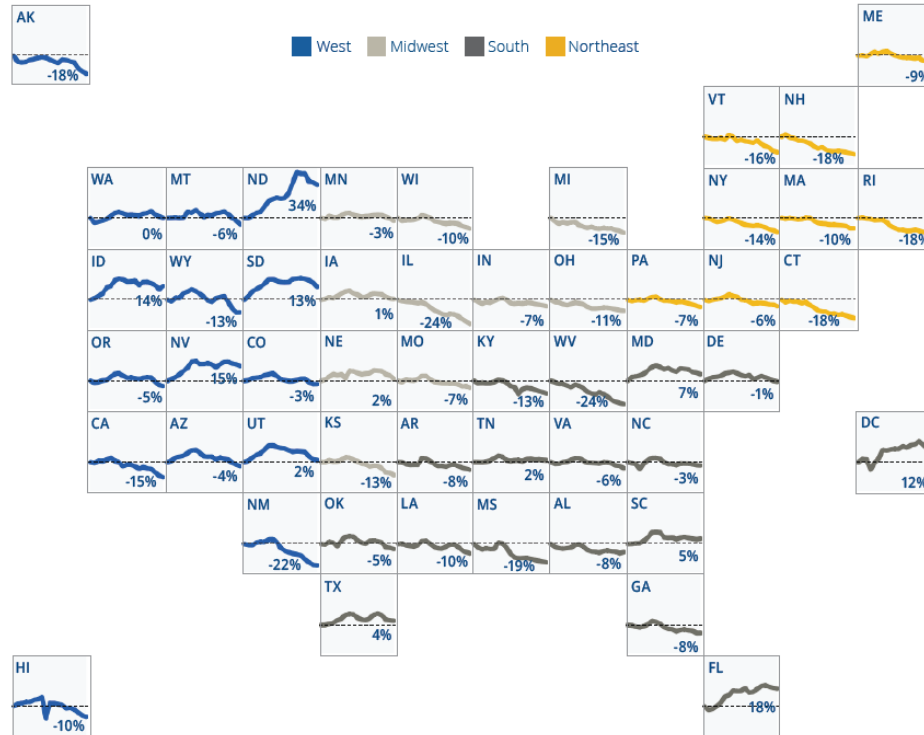
Table 2. Estimated First-Time Freshman Enrollment by Institutional Sector: 2015 to 2021

Sector	Age Group	Fall 2021		Fall 2020*		Fall 2019*		Fall 2018*		Fall 2017*		Fall 2016*		Fall 2015*
		Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment
All Sectors	All Ages	2,116,631	0.4%	2,108,579	-9.5%	2,330,022	-1.8%	2,372,541	-4.4%	2,481,066	-2.2%	2,537,955	-2.1%	2,592,703
	24 or Younger	1,955,529	-0.1%	1,957,665	-8.6%	2,143,023	-1.4%	2,172,855	-3.4%	2,248,636	-0.9%	2,269,512	-1.3%	2,299,438
	Over 24	161,103	6.8%	150,914	-19.3%	186,999	-6.4%	199,686	-14.1%	232,430	-13.4%	268,444	-8.5%	293,265
Public 4-year	All Ages	907,878	-0.5%	912,840	-5.3%	964,340	-2.0%	984,330	0.4%	980,177	-0.8%	988,016	-0.7%	994,912
	24 or Younger	878,208	-0.9%	885,807	-4.5%	927,723	-1.9%	945,672	-0.5%	950,363	-0.3%	953,444	-0.3%	956,695
	Over 24	29,669	9.8%	27,033	-26.2%	36,618	-5.3%	38,658	29.7%	29,814	-13.8%	34,571	-9.5%	38,217
Private nonprofit 4-year	All Ages	407,814	2.9%	396,228	-6.3%	423,064	-3.6%	438,777	1.4%	432,697	-2.4%	443,121	-1.3%	448,839
	24 or Younger	385,304	3.6%	371,912	-6.9%	399,426	-3.4%	413,562	-0.1%	413,851	-1.4%	419,931	-0.5%	421,886
	Over 24	22,510	-7.4%	24,316	2.9%	23,638	-6.3%	25,215	33.8%	18,845	-18.7%	23,190	-14.0%	26,953
Private for-profit 4-year	All Ages	35,846	-21.1%	45,446	36.6%	33,266	-1.0%	33,615	-37.2%	53,550	-9.3%	59,072	-23.2%	76,944
	24 or Younger	16,963	-22.4%	21,867	26.8%	17,245	-0.8%	17,384	-36.2%	27,239	-5.4%	28,804	-23.6%	37,687
	Over 24	18,884	-19.9%	23,579	47.2%	16,022	-1.3%	16,230	-38.3%	26,311	-13.1%	30,268	-22.9%	39,257
Public 2-year	All Ages	711,717	0.4%	708,735	-18.2%	866,286	-0.1%	866,912	-9.7%	960,165	-2.4%	984,030	-2.6%	1,010,633
	24 or Younger	626,017	-1.4%	634,931	-16.4%	759,649	0.9%	752,530	-8.3%	821,045	-0.7%	826,555	-2.0%	843,375
	Over 24	85,700	16.1%	73,804	-30.8%	106,637	-6.8%	114,382	-17.8%	139,120	-11.7%	157,474	-5.8%	167,257

Fall 2022: Year Over Year enrollment declines in most sectors



State-by-state projected percent change from class of 2019 to 2037, grand total of public and private schools



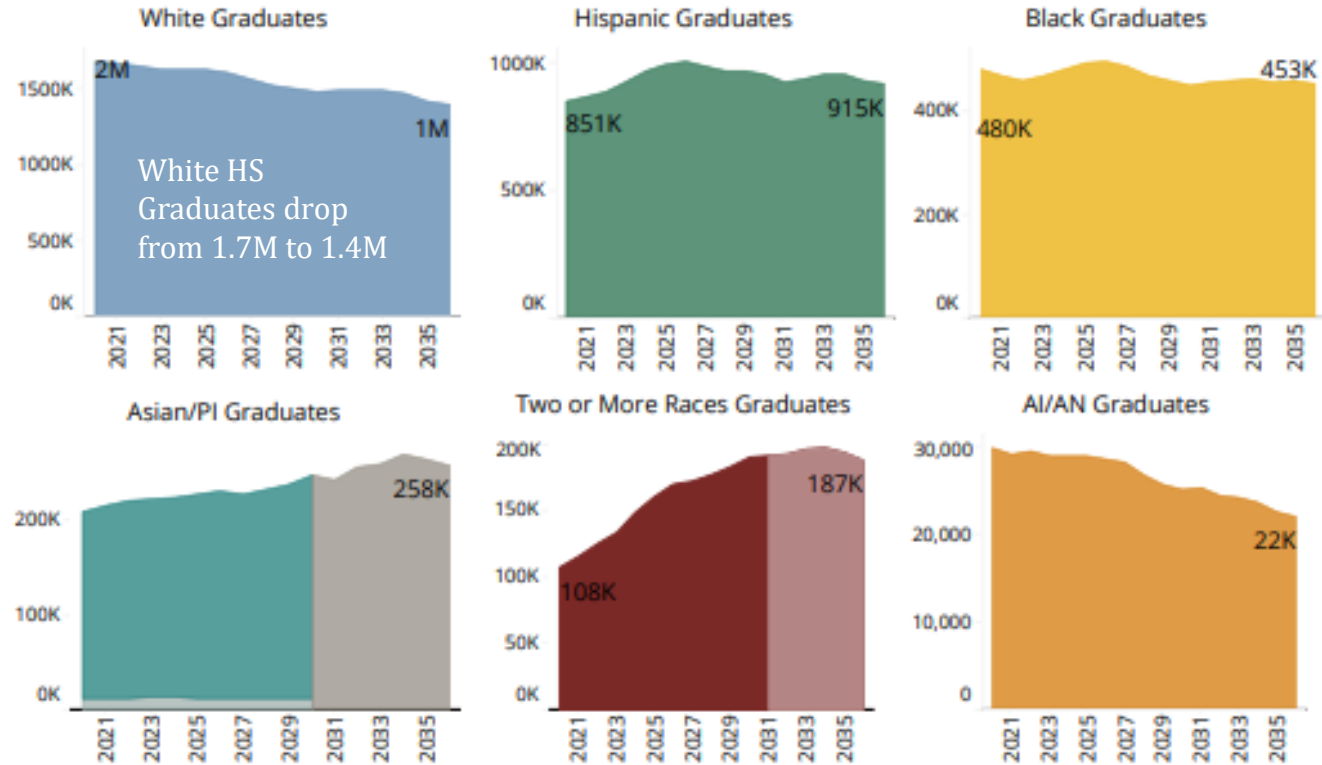
Source: Western Interstate Commission for Higher Education, *Knocking at the College Door*, 10th edition, 2020. See Technical Appendix for detailed sources of data through the Class of 2019; WICHE projections, Class of 2020 through 2037.

United States Public High School Graduates by Race & Ethnicity

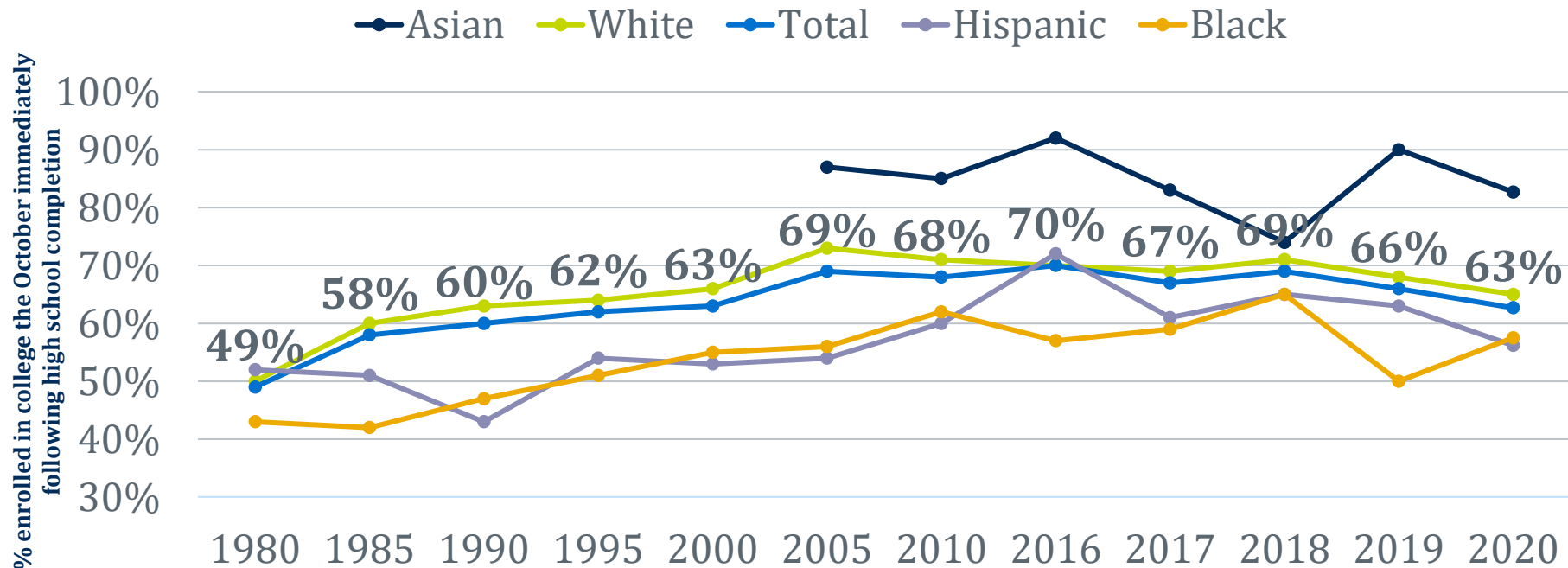
Projections for Class of 2020 to 2036



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College participation rates have been a key growth driver but they have leveled for a decade and dropped dramatically in 2020



Implications of slower growth

- Colleges that have relied on enrollment growth to fund expansion will have to adapt to slower rates of growth
- Decision-makers should level-set growth expectations in light of localized market data
- Retention and graduation strategies should be prioritized
- Your website is your #1 marketing tool
- Tracking and managing market share will become increasingly important
- The most successful institutions are deploying a diversified set of demand generation strategies identified through a strategic enrollment planning process
- Are there market verticals that you should be investing in? How are you diversifying your product (Graduate Programs, Modality, etc.)



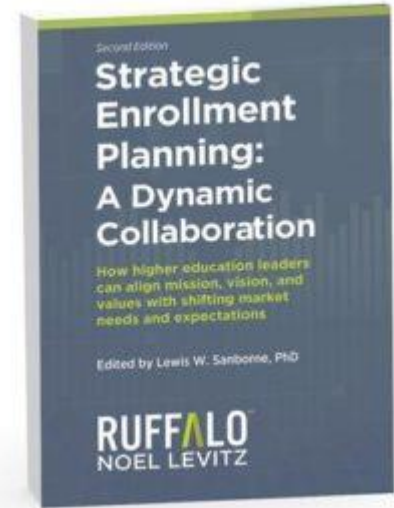
The Importance of Strategic Enrollment Planning in 2023

What is Strategic Enrollment Planning?

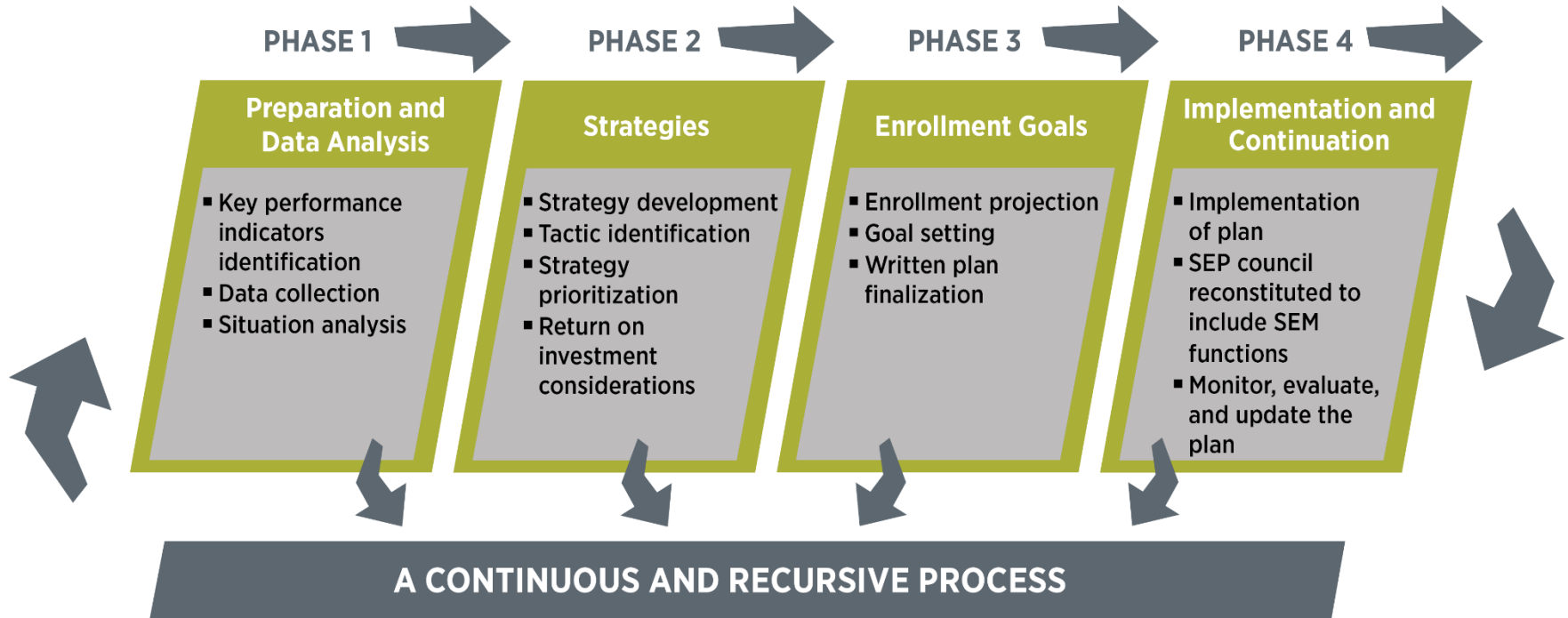
A Dynamic Collaboration

“Strategic Enrollment Planning refers to a complex and organized effort to connect mission, current state, and the changing environment to long-term fiscal health, resulting in a concrete, written plan of action. It differs from traditional enrollment planning in that it brings academic and co-curricular planning into the center of the initiative.”

– Dr. Lewis Sanborne



Four phases in the SEP process



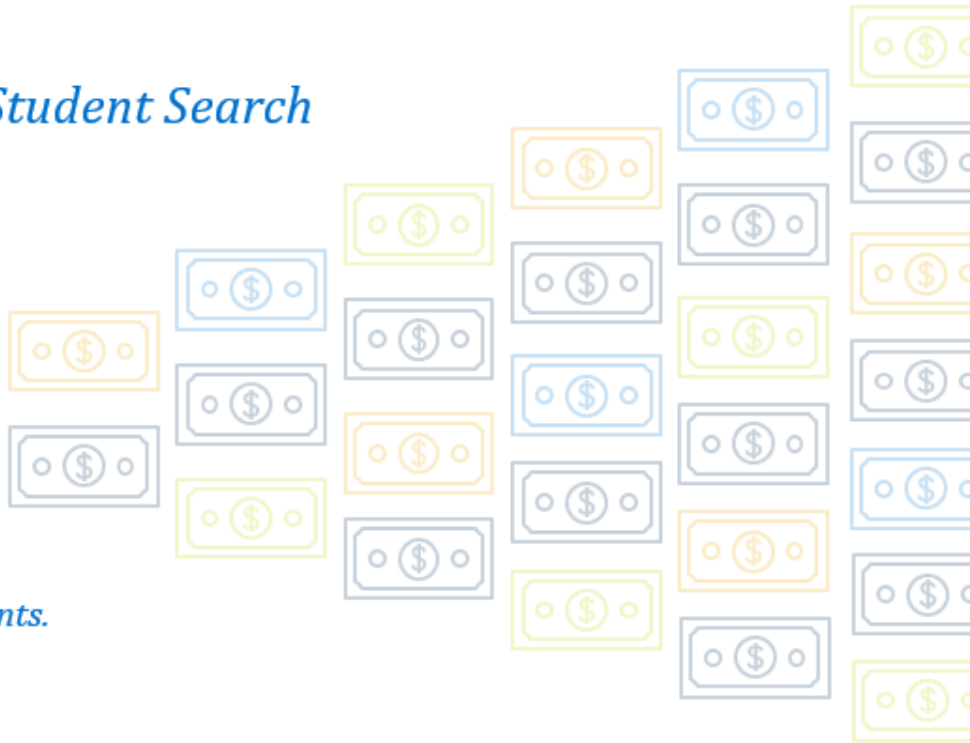
Private Institution ROI:

RNL Student Search and Engagement

For every dollar invested in RNL Student Search and Engagement, privates received

17x

Average in net tuition revenue from enrolled students.



RNL Supports the Entire Student Lifecycle

RNL is the only partner that focuses on all your revenue generation areas

RNL Strategic Enrollment Planning

RNL Student Search and Engagement

Includes RNL Application Cultivator

RNL Financial Aid Optimization

RNL Student Success

RNL Recruitment Consulting

RNL Enable – Graduate and Online Enrollment

RNL Market Research

Academic Program Demand

Price Sensitivity Analysis

Image and Perception Study



RNL Fundraising Solutions



Thank You

Questions?

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