

The Evergreen State College

New Directions for Evergreen Market Study By Larry Geri and Eric Pedersen

6 7 20 draft. To be updated as new data are developed.

Overview and Assumptions

I. Introduction

The Evergreen State College initiated the New Directions for Evergreen project at the beginning of the 2019-20 academic year. The goals of the project as defined in the project charge are to “identify and begin implementation of major new academic programs and/or curricular strategies that will substantially increase the College’s enrollment and create a path to financial stability.” The college seeks to return its enrollment to 4000 FTE over a number of years.

This project was initiated in response to significant long-term, and shorter-term enrollment declines at the college. Since peaking during the 2009-10 academic year at 4596 FTE, the college began a steady enrollment decline to 3657 FTE in 2017-18. The decline in enrollment accelerated in subsequent years, likely due to the aftereffects of the events that occurred on campus during the spring of 2017. The estimated college FTE for the 2019-20 AY of 2641 reflects a loss of 1955 students or 43 percent since 2009-10. The college has experienced a corresponding weakening of its financial position as tuition revenues have declined along with enrollments. We have relied on budget cuts, shifting costs to our summer school account, and when necessary drawing on reserves, among other strategies, to accommodate our decline in attendance.

In 2017 the college adopted MacTaggart’s three-stage model for revitalizing higher education institutions facing similar challenges (MacTaggart, 2010):

1. Restoring Financial Stability
2. Marketing and Branding
3. Strengthening Academic Programs and Culture.

This project is an element of that long-term strategy. Strengthening our academic offerings, culture and brand are critical steps toward firmly solidifying our financial stability.

II. Project Overview

The proposed New Directions model is a comprehensive rethinking of the approach the College will pursue to accomplish its mission. It has a significant number of components that the New Directions team believes will work synergistically to positively influence its reputation and brand, attract more students to the institution and enable us to shore up our finances.

This initial study will analyze the available components of the model, and the model in its entirety to make an initial assessment about its likely effectiveness at meeting a market criterion—are the new curricular elements proposed, and related co-curricular innovations likely to attract the number of new students we need to turn around our enrollment slide? This initial draft will analyze the available data from studies by Hanover Research, the college’s Institutional

Research office, available branding studies, and data from a wide variety of sources that have informed our choices about the demographic of students we should aim to attract. We will use those data to make an initial judgment about the market viability of the model. Subsequent drafts of the document will add the analysis of data from surveys, focus groups and other sources that provide a more direct test of the model's potential impact.

Note that this study is not a forecast. It will reach an initial judgment based on the available data about the market viability of the proposed model. In effect, it will test the value proposition of the new model: why a student should choose to attend Evergreen rather than another college or university. An effective value proposition identifies:

- Which customers are you going to serve?
- Which of their needs are you going to meet?
- And what relative price will provide acceptable value for customers and acceptable profitability for the customer?

This study will attempt to answer the first two of these questions. And there will be an emphasis on what students we want to attract. Hoyt and Brown (2003), Ladd, Reynolds and Selingo (2014) and others emphasize that colleges exploring significant curricular and structural changes do so with a strong focus on the types of students they intend to pursue.

The next sections of the report will provide some additional context about the challenges of the evolving US higher ed sector and the challenges faced by the college. The second half of the report will provide a summary of the model, its elements and how we anticipate them to work in tandem; examine in detail the set of non-curricular proposals, and likely new curriculum. It will conclude with a brief discussion of how this model would impact our profile in relation to our primary competitors, and make an initial assessment the model's market viability.

Note that at this time the complete set of new curricular areas likely to be proposed as part of this model is still under development. That will be clarified in the mid-June to mid-July 2020 time frame. During that period we will also bring together a set of data on the details of the proposed elements of the model that will enable us to complete a business planning process, through which we will assess implementation costs and challenges and the financial stability of the model.

III. National Context

Even before the impacts of the coronavirus pandemic sent shockwaves through the US higher education sector, the sector was reeling from a combination of factors (Carlson, 2020). The era of steady growth in the US higher education sector is over. Nationally, the number of high school graduates is in decline and overall enrollment in higher education institutions (HEI) has decreased for nearly a decade, as shown in Figure 1, though it is notable that the losses have been concentrated in two-year and four-year for-profit institutions. US population increased 4% since 2012, but higher ed enrollments were down 13%, with the decline impacting various categories of institutions unequally. Over the past several years, a large number of private colleges and universities have closed in addition to a smaller number of private non-profit institutions. In

2017 there were nearly 4,300 HEI in the US, but that “footprint” for the sector is too large to accommodate a shrinking enrollment.

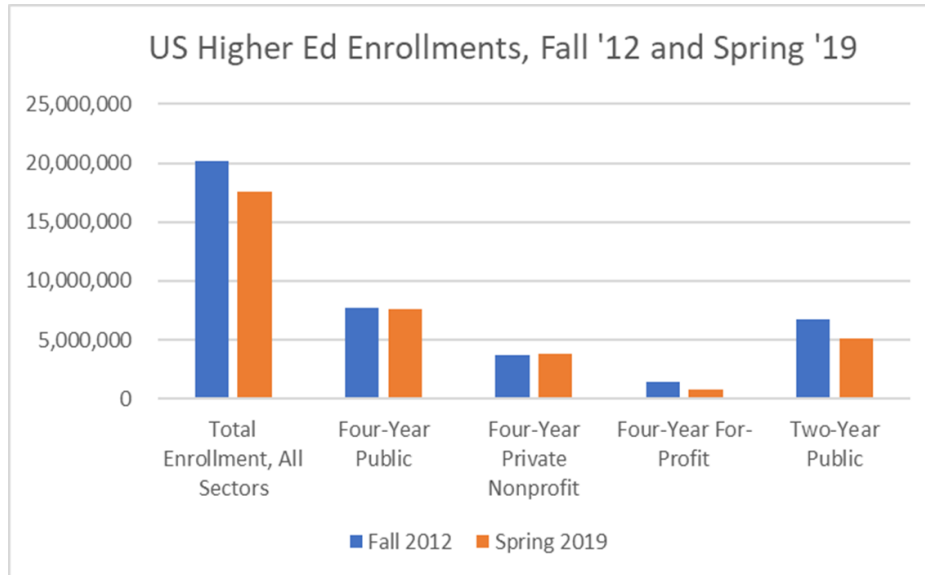


Figure 1. Source: National Student Clearinghouse Research Center: <https://nscresearchcenter.org/>.

The forecast for higher education enrollment has changed dramatically since 2018. As shown in Figure 2, The National Center for Education Statistics (NCES) revised their long-term higher education forecast in 2018, in response to the national trends in population and higher education attendance. Factors cited for the revised forecast include: stagnant college-going rates, declining high school enrollments, declining birthrates, and declining immigration.

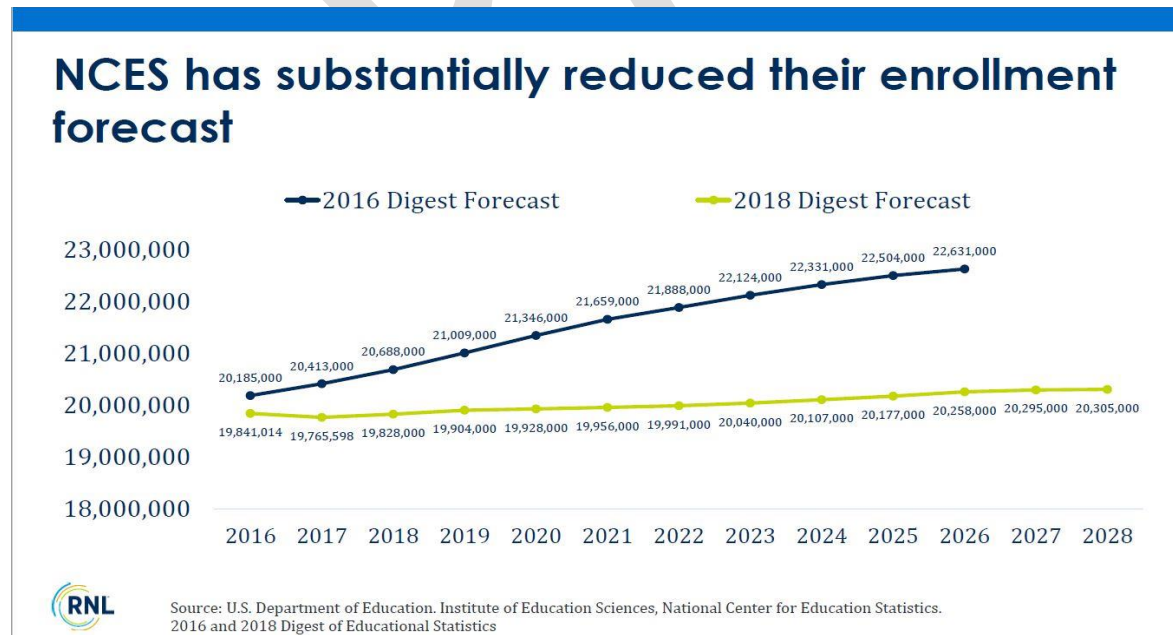


Figure 2. Source: Ruffalo Noel Levitz (RNL) and U.S. Department of Education, <https://nces.ed.gov/>.

The number of high school graduates has declined significantly in the northeastern US and is on the decline nationally. Consequently, many small private liberal arts colleges in that region with high tuition, shaky business models and less-than-compelling value propositions have closed or been forced to seek mergers. Although the available data still clearly support the value of a 4-year degree in boosting lifetime earnings, there is an increasing perception that the payoff is not what it once was (especially from the liberal arts), and that the traditional BA is not well linked to preparing students for future employment. In a Pew study, 61% of respondents indicated that higher ed was “going in the wrong direction,” and 65% that “students don’t get the skills they need to succeed in the workplace” (Chronicle of Higher Education, 2019). Concerns about exploding student debt (now an estimate \$1.6 trillion, with the average borrower owing an estimated \$32,700) and high tuition are also tempering enthusiasm for attending college (Friedman, 2020). In addition, most of the growth in HEI enrollment in the US has been generated by a small number of universities using a distance education model, notably Arizona State University, Southern New Hampshire University and Western Governors University (Chronicle of Higher Education, 2019). An increasing number of potential students are finding the somewhat lower cost and flexibility offered by these schools, and wide array of degrees available, highly attractive.

These changes have led demographic analyst Nathan Grawe (2018), Zemsky, Shaman, and Baldrige (2020) and others to conclude that the sector is likely to be split between a relatively small number of elite institutions, including Ivy League colleges and R1 state universities, a set of mid-sized state institutions likely to sustain reasonably strong enrollments, and a mass of vulnerable private and public institutions. The coronavirus pandemic has further complicated this situation. The entire sector pivoted to remote instruction during spring quarter 2020, causing a loss in enrollment that is likely to extend into the 2020-21 academic year and possibly beyond, and financial losses that are already in the tens of billions of dollars. And no one yet knows if choice behaviors on the part of potentially college-bound students (staying closer to home, taking gap years) will revert to their previous baseline.

This context is relevant for the college’s situation because every HEI either is, or should be, assessing its competitive situation and assessing what it can do to innovate and continue to attract sufficient enrollment to remain financially viable. As a result, there is significant innovation happening across the sector, even though the budget losses caused by the pandemic have rendered such innovation more difficult. We need to ensure that as an institution the model we are proposing is innovative enough and provides a sufficiently unique selling proposition over a long enough period that it will help lead us to stronger enrollments and a more secure financial status.

IV. Current situation at the college; factors contributing to our enrollment trend

In an ideal world, an institution facing a long-term declining interest in its product would have a clear “story,” informed by data, about what brought that about. This would help inform the process of determining the strongest set of turnaround options. While Evergreen has some strong clues about these factors, it isn’t a simple story.

Several factors appear to be related to the college’s long-term enrollment struggles. These include: 1) a long-term decline in community and technical college (CTC) enrollments in the state, which have decreased consistently since reaching 2009, as shown in Figure 3. Evergreen’s

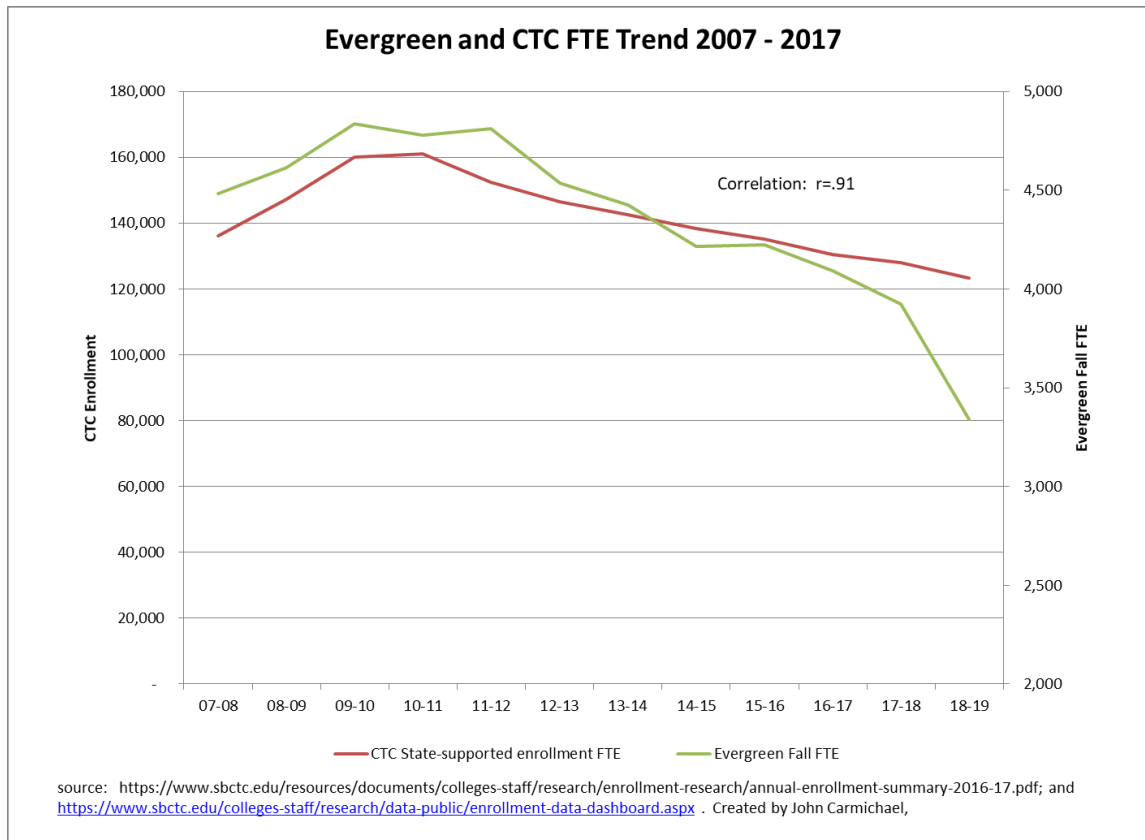


Figure 3. Washington state Community and Technical College, and Evergreen State College enrollment trends, 2007-2017.

enrollments depend both on high school direct applicants, and on student transfers from the CTC system. Through 2017 Evergreen FTE paralleled Washington’s CTC system FTE. As community college enrollment rises and falls, so does Evergreen’s historically. And Grawe also projects a continuing US slide in transfer student enrollments (Grawe, 2018). Whether this statewide (and national) decline is related to the improving economy over that period is unclear.

2) Challenges with the college’s overall brand awareness and brand. Several studies (Simpson Scarborough, 2017; Hanover Research, 2020, Student Insights, 2013) have noted that many potential applicants simply are simply not aware of the college as an option. These studies have also found low “favorability” ratings of the college, that there are perceptions of the college as less rigorous, with a more opaque curriculum than its competitors, and that we appeal primarily to a particular niche of students. For example, high school college counselors interviewed by Simpson Scarborough hesitated to mention Evergreen to students who were not quirky, introverted students with average grades who are focused on political and environmental

activism. 3) Often prospective students are seeking particular areas of study, and responses from the surveys referenced above reflect that when those are not visible (“doesn’t have my major”) it may be a significant factor in their lack of interest.

Since 2017 Enrollment Services has conducted a survey of students admitted for Fall Quarter but who choose not to enroll, also known as a “withdraw survey.” The 2017 survey was conducted internally by Sam Havens in Enrollment Services and focused on Admission Office contact with students. The 2018 and 19 surveys were outsourced to a researcher at MediaCross and

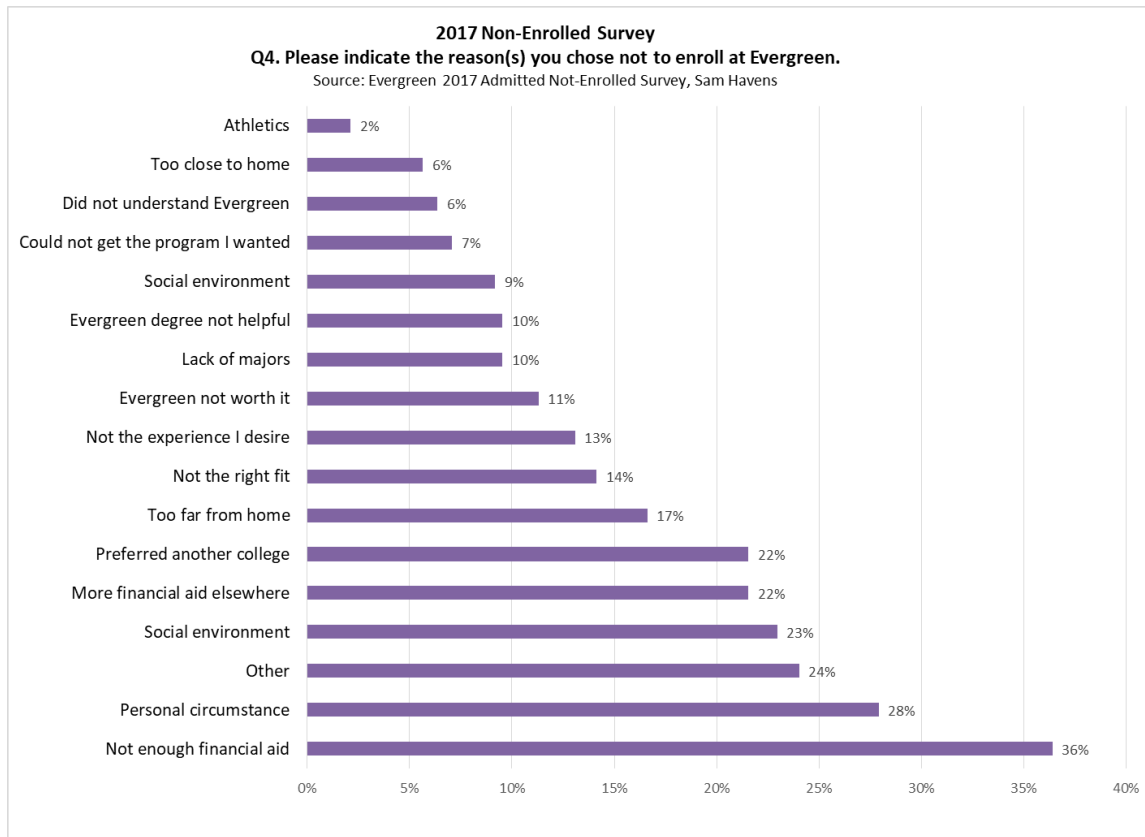


Figure 4. 2017 Non-Enrolled Student Survey. Source: Evergreen Enrollment Services.

incorporated best practices and questions for non-enrollment surveys. (The 2019 survey did not receive sufficient responses to complete an analysis.) The graphs above and below show the ranked responses for reasons not choosing Evergreen in 2017 and 2018. A lack of financial aid support from Evergreen is common to both sets of responses as well as “personal circumstance.” The 2018 survey results reflect that over 1/3 of respondents did not see Evergreen as “the right fit,” and over a quarter had concerns about its social reputation and simply had a preference for another college or university.

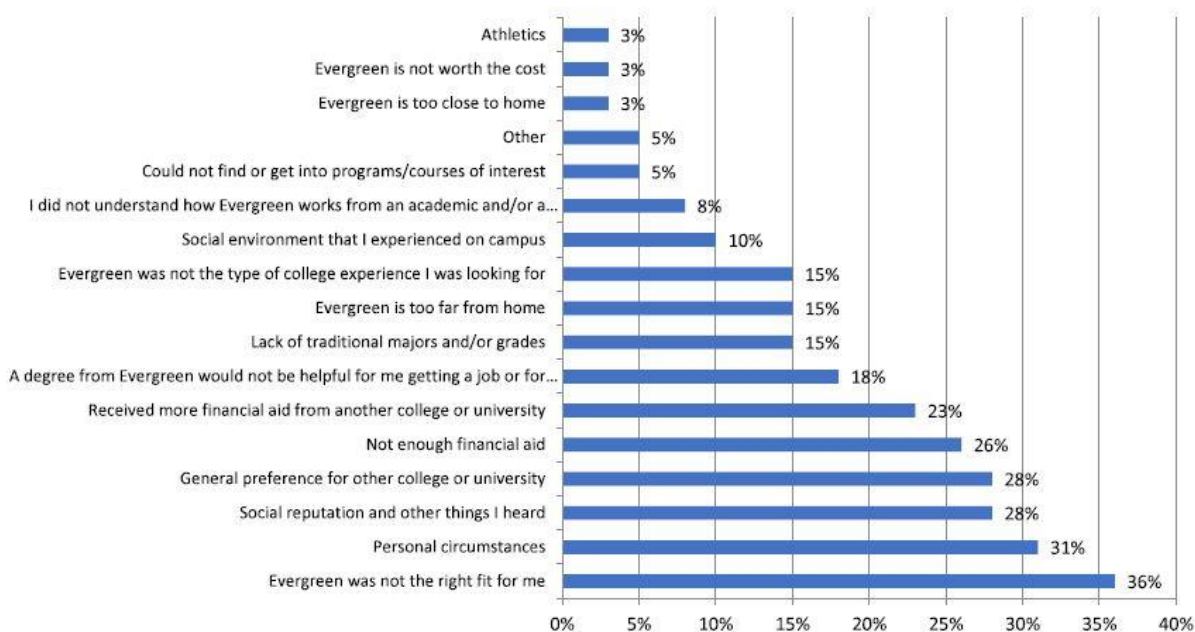


Figure 5. Evergreen Non-Enrolled Student Survey 2018, responses to the question, “Please indicate the reason(s) you chose not to enroll at Evergreen.” SourceMediaCross; www.mediacross.com.

4). A final and important piece of this puzzle is our still unique coordinated studies model focused on interdisciplinary 16-credit programs for full-time students. Institutional research data confirms that students at the college find the model compelling: 91% of students responding to the spring 2019 Student Experience Survey were satisfied or very satisfied with the college’s interdisciplinary approach to education; 94% were satisfied or very satisfied by the faculty team teaching model.

There are significant data suggesting the advantages of an interdisciplinary approach to higher education pedagogy (SERC, ND) and observers both inside and outside the academy see it as a compelling way to engage complex problems from multiple perspectives and help students to prepare for graduate studies and careers (Irani, 2018). It also supports the critical need to enhance students’ capacity to analyze complex and ambiguous situations and learn how to take action.

Interdisciplinary teaching and supporting structures are a consistent theme throughout the case studies in Stanford University’s *Uncharted Territory* that aim to reimagine US higher education (Stanford Design School, 2019). Yet it remains unclear whether there is significant student demand for this approach to higher education. A real, though anecdotal challenge regularly faced by the college’s recruiters is the difficulty of explaining the college’s model to prospective students whose “mental map” of higher education is of a college or university with majors and departments. And where the day-to-day experience they anticipate is of juggling a set of classes over the course of an academic quarter or semester, not one integrated program.

V. Possible Student Markets for Evergreen

It is crucial for any market study to assess how many people are likely to want to buy the new service or product under consideration. This is especially challenging in the higher education sector due to the complex combination of demographics and prospective student behavior. We need to estimate how many students will emerge as graduates from the state's K-12 sector and how many of those students will choose to attend college. A particular difficulty in Washington is that many graduates do not choose to attend college; we rank 48th nationally in the percent of 18-24 year olds attending college, at 31% (National Information Center for Higher Education Policymaking and Analysis, 2020).(By comparison, Oregon is at 36%, and California at 42%). We need to consider population subgroups; notably, the state's Latinx population is increasing, but the college attendance rates of Latinx high school students is below the state average. And the coronavirus appears to have changed student choice behavior, increasing the likelihood that potential applicants will attend college closer to home than in the past.

The tragic loss of jobs and economic disruption associated with the coronavirus response will also likely have important impacts. It is likely both to change the trajectory of the overall economy and nature of work over the next decade. It will also provide incentives for those left unemployed (call them the "Recession Retoolers") especially from hard-hit sectors such as retail, food and hospitality, to invest in new skills and competencies. These prospects will be older and career focused and likely looking for a high value experience that may not entail completing an entire degree program.

College choice behavior is very complex. Prospects, especially those coming direct from high school, are making a momentous lifestyle choice that transcends what economists might frame as a simple decision to invest in their human capital. Typically they want to belong to a community where they feel accepted, with a strong sense of belonging, and when living on campus, has a vibrant energy and social options (Horn and Moesta, 2019).

Beyond the appeal of the new model to individual students, in today's higher education market place it's important to know that few students make their decision alone. The role of influencers ranging from parents to employers can play a significant role in a student's college choice. Whichever new academic offerings or curriculum structure Evergreen chooses, being attentive to how these influencers will respond must be considered. What we know from our 2018 non-enrolled survey is that parents were the primary influencer, followed by friends, as shown in Figure 6.

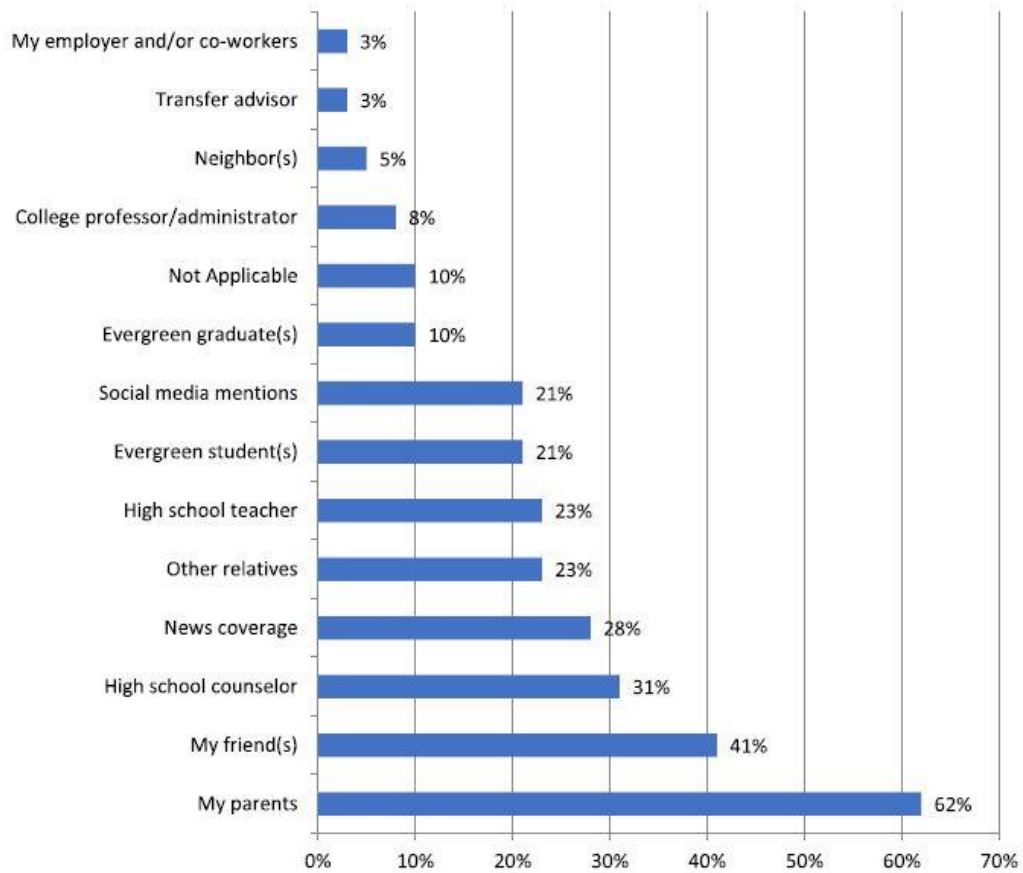


Figure 6. Primary influencer of students responding to the fall 2018 non-retained student survey. Source: MediaCross.

We also know from the same survey, what the respondents perceived to *be their influencers' thoughts on Evergreen* as shown in Figure 7. These responses reflect the extent to which respondents perceived the news, social media, neighbors, and their friends as sharing a negative perception of the college. Nearly half of parents were neutral, while 30 percent were negative. Three-quarters responded that their high school counselor was neutral on the college, while one-quarter said their counselor was positive about Evergreen.

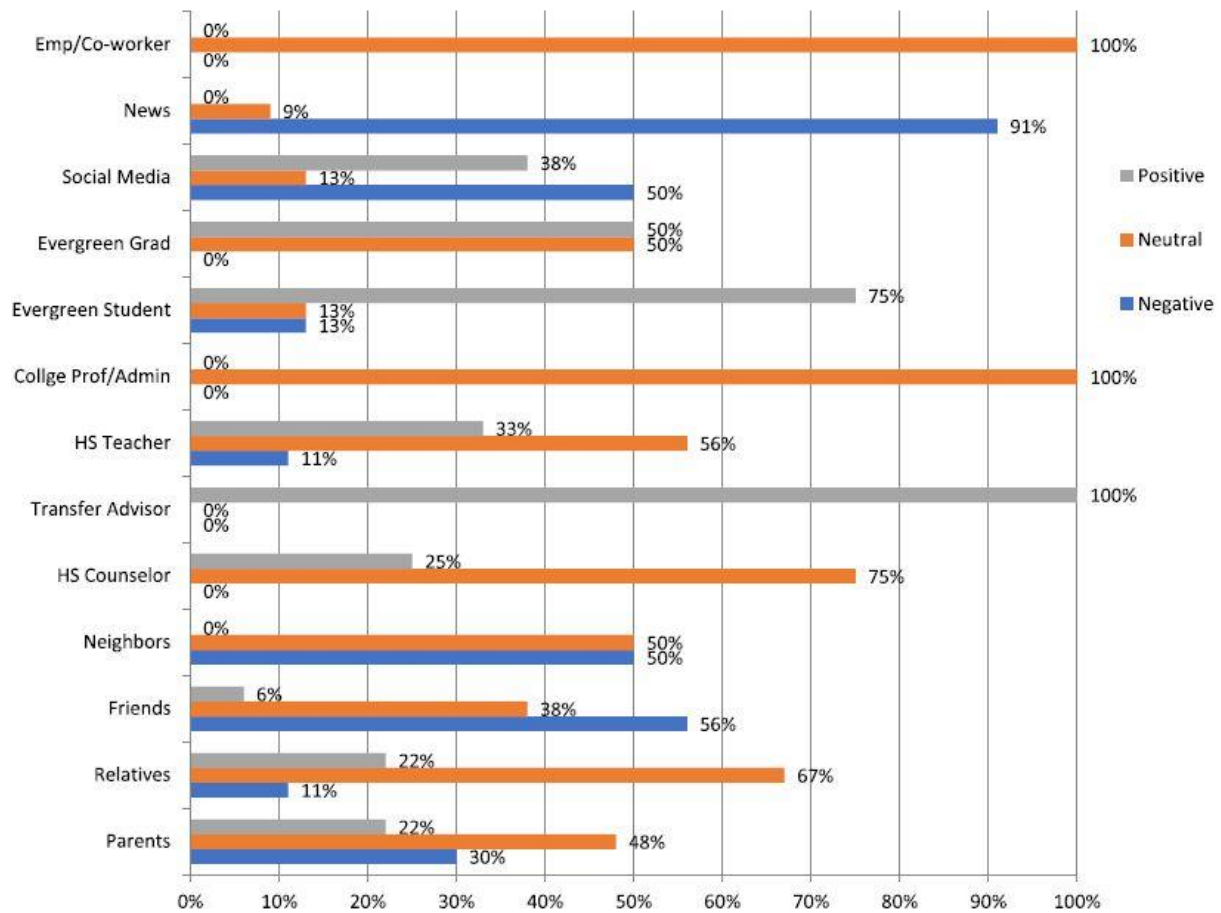


Figure 7. Non-retained student survey 2018. Respondents perceptions of their influencers' thoughts on Evergreen. Source: MediaCross.

Horn and Moesta's research also identified several relevant motivations for college bound students, including getting away from their current living/life situation, getting into the best school possible, acting for others and doing what's expected of them; "stepping up" their game, and learning to extend themselves. Similarly, Ladd, Reynolds and Selingo's 2014 analysis of survey data differentiated between what we typically associate with high school-direct students (two groups they termed "aspiring academics" and "coming of age") and more career focused groups termed "Career Starters," "Career Accelerators," and later in life students he termed "Industry Switchers." These authors were likely prescient in identifying the turn toward a greater career focus on the part of a wide range of potential postsecondary students. A 2018 poll concluded that US students primarily choose to attend college to enhance their employment prospects, then select a specific institution based on other factors (Strada/Gallup 2018).

Over the remainder of this section we will briefly examine available demographic data on the US and Washington state, and consider what groups of potential students would be the best group around which to construct a turnaround strategy.

Although both the US and Washington state continue to increase in overall population, due to a decline in the US fertility rate since 2008 there are simply fewer high school graduates emerging from the K-12 education sector, which is already impacting enrollments nationwide. Grawe forecasts a sharp drop in US high school graduates as a result, as shown in Figure 8.

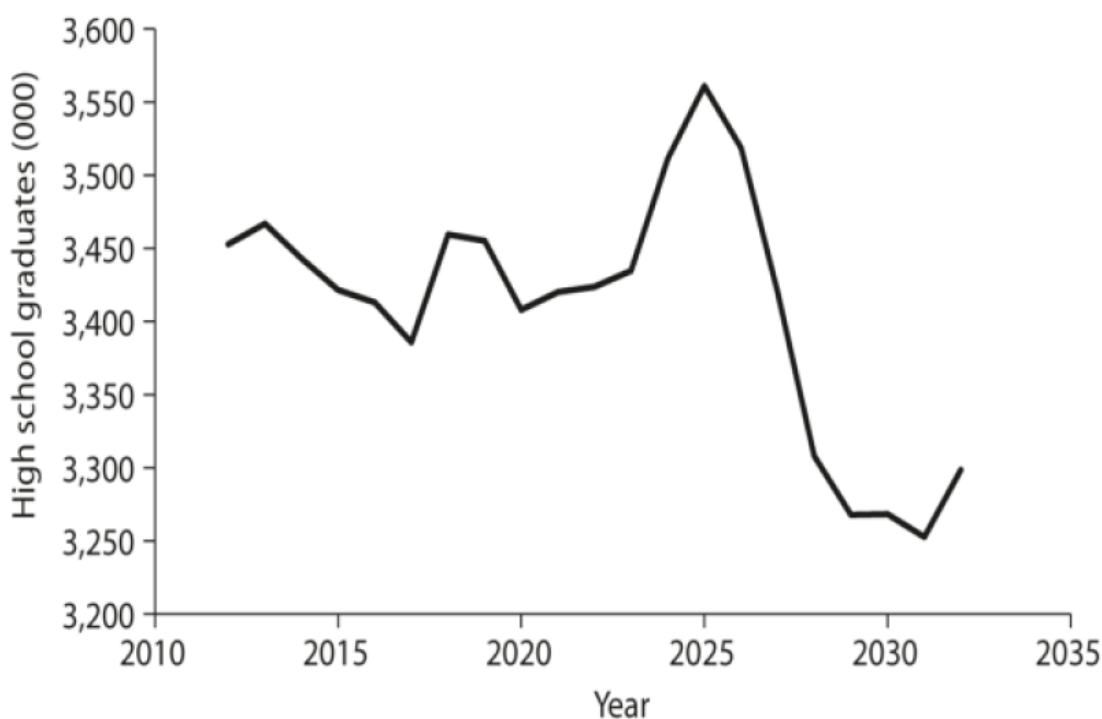


Figure 8. Forecast number of US high school graduates by year of graduation, 2012 to 2032. Source: Grawe, 2018.

Grawe (2018, p. 34) is pessimistic about the overall outlook for US higher education: “Total numbers of students are headed toward a cliff...the coming contraction in higher education may be proportionately larger than that in high school graduates.”

Helpful sources of demographic data on high school graduates include the Western Interstate Commission for Higher Education (WICHE) *Knocking at the College Door* forecast (though it is now dated given it was completed in 2011), as well as Nathan Grawe’s projections in his text *Demographics and the Demand for Higher Education* (Grawe, 2018). Data from Washington’s Office of the Superintendent for Public Instruction show a gradual increase in the number of high school graduates from 2013-14 to 2018-19. In recent years these figures track reasonably well with WICHE’s projections, with the five-year cohort graduating in 2019 totalling 70,973.

WICHE's projection is for graduations to peak at 76,815 in 2026, but that is likely to be an overestimate.

Grawe forecasts the number of students attending regional four-year colleges and universities between 2012 and 2029. His data differentiate between a state's overall forecast and that of large metropolitan regions (such as Seattle-Tacoma-Everett) that may have a different trend. For Washington state, he projects an overall decline between -2.5 and -7.5 percent, but an increase of 2.5 to 7.5 percent in the Seattle metro region. It is worth noting that this overall decline is less than his predicted reduction in the number of college attending students in Washington state overall, which he forecasts to fall by over 15% (though less in Seattle). He also forecast enrollments at two-year institutions, which he projects to fall nationwide, and by greater than 15% in Washington state. In contrast, Grawe sees the country's elite colleges and universities (which includes the University of Washington) continuing to prosper.

These data suggest that it will be difficult for Evergreen to have success with a turnaround strategy based on attracting more of what is likely to be a shrinking, or at best stable, pool of high school graduates in this state. A related factor is that we can no longer bank on recruiting a large number of non-resident or out-of-state students. Over the past few years that proportion of our undergraduate student body has declined from 25% to around 16%, and is not likely to grow in the medium term due to COVID cautionary behavior.

An Alternative Scenario: Some College, No Degree and “New Majority” students

One of the national trends that has gained increasing attention from state and federal policymakers in recent years is the huge number of “some college, no degree” students in the US. By one count, there are around 36 million people in that category, including 1.1 million in Washington and over 50,000 in Thurston County (Shapiro, et al, 2019; US Census). After 8 years, one-third of students who began college have earned no formal credential and are no longer in college, despite having piled up student loans they must pay. The lack of completed credentials, AA, BA or BS degrees, or certificates--is also a strong barrier to career success. This situation also has impacted structural inequality given that a high proportion of these individuals are people of color (Shapiro, et al, 2019).

In response, many states, including Tennessee and Washington, have implemented programs to help these students complete a degree or credential. Washington's College & Career Compass aims to help them navigate what can be a complex higher ed system and regain their momentum toward a degree or other credential. The Washington College Grant will provide a critical funding source for these students although the capacity of the state to maintain this support in a post-COVID budget environment is uncertain (Long, 2020)

This group of students also overlaps with what has been termed the “New Majority” of students that includes first-generation college students, students of color, adults and military veterans (Maimon, 2018). Maimon and others have documented the need for colleges to “integrate support into every student's experience,” through a strong suite of wraparound services, as we will discuss in more detail below. Data from Institutional Research confirms that the college

already serves many students in this category, with 45% of our students below the federal poverty level, and 41% Pell Grant recipients.

And there are tens of thousands of unemployed Washington residents who will be considering options for enhancing their skills and competencies, to improve their chances at finding employment in what is likely to be a challenging post-COVID job market. The college is now exploring how to integrate its curriculum into the region's workforce development system in a way that provides these residents with powerful learning options, while retaining our commitment to broad interdisciplinary teaching.

Expanding the college's capacity to serve this large and broad group of potential students is the scenario that has the greatest potential for us to turn around our enrollment curve. This would move us toward a model emphasizing college completion for transfer students and offering an array of certificates, and would require that we expand our capacity to provide all of our students with the expanded suite of services—and resources—that experience elsewhere shows is critical for their success.

VI. The Proposed Vision and Model

During the current academic year the New Directions team designed and implemented a detailed strategy for crafting a new vision and model for the college. This included extensive data collection on new ideas emerging from the higher ed sector and elsewhere, research studies and surveys by Hanover Research, a compilation of relevant studies and data from the college's Institutional Research staff, outreach to the campus community through a number of "Blue Sky" sessions, a project website, a well-publicized effort to encourage submissions of ideas to the team's Coordinating Group, and targeted sessions with key constituencies.

The resulting model features a combination of new and expanded curricular elements, services, brand changes, structural changes and specific new areas of curricular study that collectively reflect a significant new direction for the college. These are described in the Conceptual Plan document, and it's important to repeat that the specific areas of study that may be added are still being determined. We will start with the proposed new curricular categories.

A. New or Expanded Curricular Elements

The model proposes adding or expanding several elements to the college curriculum, including capstone projects, certificates, credentials, and expanded access to experiential learning, including internships and field work.

A capstone project is a culminating experience, typically late in a student's senior year, that provides a student with the opportunity to demonstrate what they have learned through the course of their studies. Capstones are common in US higher ed across a wide variety of fields from computer science to education to psychology. They provide an opportunity to hone skills, build new competencies, and help students strengthen their resumes in preparation for graduation. Studies and evaluations of capstones offered in a variety of fields have found that they are associated with perceptions of increased rigor and are positive for students, although they can be challenging to organize (Jiji, Schonfeld and. Smith, 2013). Evergreen can

incorporate capstone projects into the curricula of its Paths of Study, and faculty could provide students with a broad variety of options including research projects, performances, creating art, etc.

Certificates and Credentials. Certificates are awarded for completion of an educational program of study within a defined area. These are narrower than a typical college major and provide the opportunity for students to obtain expertise in a field more quickly and at lower cost than is required to complete an entire degree program. They may be offered to undergraduate, post-bac, and non-matriculated students. Certificates are becoming increasingly popular in part because of their much lower cost, in terms of both tuition and opportunity costs of long-term college attendance. The need for such educational opportunities is critical because an increasing proportion of positions require postsecondary education.

The positive impact of certificates on employment and incomes has been documented in a number of studies although those impacts vary across both academic fields and programs (Jepsen, Troske and Coomes, 2014; Xu and Trimble, 2016). The notion of “stackable” credentials is important because during their lifetime an individual can “stack” a variety of degree or non-degree credentials that document their skills, competencies, and achievements. In this way, it encourages people to be lifelong learners. Evergreen could offer certificates in a wide variety of fields of study, within or across paths, and provide the option of “design your own” certificates to students.

Experiential Learning/Internships. Internships are work experiences offered by organizations, typically outside the college, to provide students with exposure to the work environment in that sector or industry. Often an internship is related to the student’s field of study and ideally enables the student to gain knowledge about the industry and improve their competencies and skills in specific areas. Internships may be paid or unpaid and can provide significant benefits to both the organization and student. Internships provide a powerful link to potential employment and may also help students figure out what fields they are *not* interested in, before investing time and resources in extensive study. “Co-ops” are similar to internships but typically entail alternating periods of full-time, paid employment with college coursework.

The power of the internship model is well documented and has received strong support from authors such as Joseph Aoun (2017). His *Robot-Proof* model argues that a well-rounded liberal arts education, combined with experiential learning opportunities, will support students’ ability to adapt to change. To increase the number and type of internships offered by an HEI requires a serious institutional commitment to staff and internal systems. The proportion of Evergreen students engaged in internships has declined in recent years. Investing in additional staff capacity and the information systems required to support more internships on campus would provide current and potential students with a strong signal of the college’s commitment to helping them prepare for future employment.

Expanded Transcript. The current Evergreen transcript consists of a cover page showing degrees awarded and credit equivalencies, with an academic statement followed by faculty evaluations of the student’s achievement in each academic program, and the student’s self-

evaluation associated with each program. The revised transcript would emphasize the skills, knowledges and competencies gained during their time at the college, certificates earned and internships completed. It conceivably could be designed to mirror a student's resume; this would be beneficial both to potential employers and graduate schools but also provide powerful feedback for the student about the array of competencies gained through their Evergreen experience.

B. Non-curricular elements and branding

Enhanced Student Support. As described briefly above and in the Conceptual plan, a strong model of “wraparound” advising services would provide consultation and coaching that assist all students in meeting basic needs, building relationships, and helping guide the student toward curricular and professional options tailored to their interests. A number of rigorous evaluations of comprehensive programs to provide such support at the community college level, such as the ASAP (Accelerated Study in Associate Programs) program, or the similar model at Tarrant Community College in Tarrant, Texas have found that they can be cost-effective thanks to the significant increases in retention and graduation rates they generate, although initial implementation can be costly (Scrivener, et al, 2015; Evans, et al 2017).

Branding: Becoming a university. As summarized in the Conceptual Plan, the name “The Evergreen State College” is no longer an inaccurate term for describing our institution. Becoming a university would send a strong signal to the community and prospective students about the changes being proposed at Evergreen and would support the sense that we are significantly restructuring or even refounding the institution.

C. New Curricular Structures, New Curriculum and Delivery Options

The specific set of new curricular options that will be implemented as part of the new model is still under development. Several possible areas are under consideration, including:

- Climate Justice and Sustainability
- Workforce Development;
- Expanded psychology, health and wellness offerings
- Expanded Business, Entrepreneurship and Social Entrepreneurship offerings
- Art/design/digital media/computer science
- Education (possible new Path)
- Transformative Justice, Prison Education & Legal Studies (possible new Path)
- LGBTQ+ & Gender Studies (possible new Path)

Over time, the model will also incorporate additional graduate program offerings.

These options reflect both an extensive set of data from Institutional Research confirming student interest in psychology, environmental studies, art, computer science, and business. The top six are also consistent with findings from a series of reports from Hanover Research, including the survey administered in February 2020 as shown in Figure 9.

Which of the following areas would you be interested in studying? Please select all that apply.

	No-residency (n=51)	Low-residency (n=160)	High-residency (n=66)
Psychology	27%	38%	35%
Business and Entrepreneurship	35%	30%	26%
Arts Design and Media Technology	27%	31%	27%
Visual Arts	20%	23%	26%
Food and Agriculture	12%	23%	14%
Integrated Biology and Chemistry	18%	16%	17%
Interdisciplinary Computer Science	24%	14%	9%
Mathematical and Physical Sciences	16%	9%	17%
Culture, Text, and Language in World Societies	10%	16%	12%
Political Economy, Global Studies, and Environmental Justice	12%	13%	15%
Environmental Studies	8%	20%	5%
Literary Arts	6%	11%	14%
Natural Resources Management: Fish, Forest, and Farm	4%	16%	6%
Climate Science and Policy	4%	11%	12%
Organizational Change and Leadership	6%	8%	5%

Figure 9. Areas of interest expressed by respondents to Hanover Research survey. (Hanover Research, April 2020).

There is some inconsistency between the above survey data, showing relatively little respondent interest in Climate Science and Policy, and the recommendations from Hanover’s January 2020 analysis *Benchmarking: Climate, Environmental Justice, and Sustainability Programs* (Hanover Research, 2020). That study recommended creation of a Climate Justice pathway, in part because of growing interest in the area on the part of the new generation of students, and a forecast that occupations linked to climate, environmental justice and sustainability are projected to experience above-average growth in the coming decade.

It is also important to briefly mention the emerging model for delivery of the curriculum that will feature a mixture of in-person (“high res”), hybrid and “low residency” options. Many students throughout the entire higher ed sector are now experiencing remote instruction for the first time. This will set their baseline expectations about this style of learning in a misleading way, given that few HEI had the time or expertise required to incorporate best practices for online teaching into these courses.

A 2019 survey of institutions conducted by Ruffalo Noel Levitz sought insights about their recruitment practices for adult undergraduate students; 21 four-year public and 46 four-year private institutions responded. As shown in Figure 10, high proportions of the four-year public respondents offered a wide mix of formats, including evening classes, in-person instruction (“on-ground, on-campus”), 100% online, and “mixed modalities.”

2. Program format

Note: respondents selected all that applied

Type of program	FOUR-YEAR PRIVATE	FOUR-YEAR PUBLIC
Cohort-based	28%	18%
Evening classes	72%	64%
Weekend-based	32%	18%
On-ground, on-campus	57%	64%
On-ground, off-campus (e.g., a satellite learning center)	36%	41%
100% online	64%	73%
Mixed modalities (online and on-ground)	68%	64%
Self-paced	9%	14%
Competency-based model	4%	5%

Figure 10. Program formats offered by respondent institutions. Source: Ruffalo Noel Levitz: *2019 Adult Undergraduate Marketing and Recruitment Practices Report for Four-Year Institutions*, <https://www.ruffalonl.com/>.

Data from our Hanover Research studies regarding the potential of hybrid or low-res delivery approaches is somewhat contradictory. Respondents to the February 2020 survey were fans of fully online or hybrid/low-res programs and courses: 67% of the 311 respondents to the survey preferred this option, and only 21% preferred in-person teaching. Associated with this finding, Hanover recommended that we “consider offering a curriculum that is flexible in format (mix of on campus and online courses, a low residency option), particularly in the subject areas of psychology, business and entrepreneurship, and arts design and media technology” (Hanover Research, 2020). But Hanover’s more recent study of the impact of low-residency options at a selection of US campuses suggests caution, noting that implementing a combination of low-residency and other options takes several years, and that dual-residency models on these campuses rarely produced significant enrollment changes in the following years (Hanover Research, 2020). Consequently, they recommended careful pilot or scenario testing of this option.

VII. Competitors

The college identifies its strongest competitors through several means, notably an analysis of its “admit no enroll” students, who apply for admission and are accepted, but ultimately decided to enroll at a different institution. This group is regularly surveyed to determine why they didn’t attend and discover where they did. Most students from within the state who opt not to attend ultimately enroll in 2-year schools or one of the other state four-year baccalaureate institutions, Western Washington University, Central Washington University, the University of Washington

or Washington State University. There is also a separate list of colleges belonging to COPLAC (Council of Public Liberal Arts Colleges) that are a strong option for students seeking such a college experience.

Our analysis of how the proposed model would differentiate us from this group of other institutions is just beginning. The interdisciplinary emphasis in our curriculum will continue to distinguish us from these other schools. We need to figure out how to market that effectively as a very effective way for students to develop critical thinking and analysis skills that will prepare them for graduate school, life and the job market.

In response to the enrollment losses at many community and technical colleges, many of these institutions have begun to offer applied bachelor of science degrees in a wide variety of fields. (Although South Puget Sound Community College has no plans to do so). Although enrollments in these programs have generally been weak, they bear watching. Many of these institutions have also removed the word “community” from their title.

Some of our competitor institutions, notably Western, already have made decisive moves to emphasize climate studies as an element of their curriculum. We will need to distinguish our approach from Western’s, but the climate arena is large enough to do so.

These institutions, notably the other state 4-years, have the advantage of regularly developing and offering new curriculum, while Evergreen has traditionally put its innovative energy into our yearly round of new coordinated studies programs. We are likely to need to change this practice so that new types of curricular content can be made available to students on a regular basis.

VIII. Market Analysis

Viewed separately, most of the elements of the proposed model described above are not new to US higher education. The efficacy of capstones, certificates, internships/experiential education, and intensive or “wraparound” student support as elements of an effective model of US higher education are well documented. The growth in popularity of online learning at the post-secondary level is unquestioned, although how student attitudes toward remote teaching, hybrid and “low-res” models will shake out following the COVID phase is difficult to predict. The model continues the college’s historic emphasis on an interdisciplinary approach to learning, while emphasizing how this approach can better prepare them to be active changemakers in the complex world and job market that will emerge after the pandemic.

The proposed revisions to the Evergreen transcript are a significant innovation. This would emphasize a commitment by the institution to helping students communicate to themselves and others not just the programs, courses and certificates they have completed but the skills, knowledges and competencies they have gained.

Our initial conclusion is that the model, viewed comprehensively, contains an impressive combination of curricular and co-curricular innovations, and is of sufficient magnitude—it is “big enough”—to impact positively what we believe is our biggest single challenge, the college’s long-running reputational issues. These are well documented in a series of studies since 2013, and again in the February 2020 survey by Hanover Research. Hanover reported that survey

respondents reported a less positive impression of Evergreen compared to our peer public and private institutions. Slightly over half (51%) of respondents rated their overall impression of the college as “positive” or “very positive,” while between 61 and 78% of respondents gave a positive overall impression of our competitor institutions. And 61% of respondents stated that they are not likely to recommend Evergreen to friends, family members or colleagues. (Hanover Research, 2020b).

Backed by new curricular structures, exciting new curriculum and the adoption of a new name, we believe that Evergreen State University has a better-than-even chance of changing perceptions on the part of potential students and their parents who in recent years have not been willing to consider the institution as an option. We base that judgment in part on a comparison with other campuses around the country that have generated successful turnarounds, including Agnes Scott College and Plymouth State University. In the short-run, new curriculum, including certificates aimed at “Recession Retoolers” and particularly an investment in an expanded psychology curriculum and Climate Justice, will likely attract some students. In the longer-term, gradual implementation of this model has the potential to attract a large number of students who may not have considered Evergreen in the past.

We are now initiating a direct market test of this model and of the individual elements through the student survey that began to be administered on Friday, May 15th, plus additional focus groups. An initial focus group with seven students on Friday, May 8th, gave reasons for optimism. The participants were positive about the features of the model and felt that it reflected a willingness by the college to take action on some long-running problems, notably the need for stronger support and advising. A plurality of the group stated that it felt “big” enough to be able to impact perceptions of the college and our enrollment challenge.

Student Survey Data

The Student Engagement Team of the New Directions project surveyed Evergreen students about their reactions to the proposed new model of the college from May 15 to 26, 2020. Students were informed of the survey through their My Evergreen account; they were provided a summary PowerPoint describing the model to view before responding to the questions. Note that the version of the model tested did not include the schools framework eventually approved by the faculty. There were 143 responses to the survey. Overall, respondents viewed the proposed model favorably, as noted in Figure 11. 61 percent had a positive or very positive first reaction to the model while only 13 percent disapproved (with negative or very negative responses). 68 percent of respondents were very likely or likely to recommend the college based on this new model, and 87% found it somewhat unique or unique, and 92 percent responded that the proposed model had either a positive or no impact on their plans to enroll here in the future.

Respondents found certain features of the model particularly important to them, including the ability to craft their own degree program, enhanced advising and student support, a revised transcript, greater availability of experiential learning, and equity and inclusion as central values as shown in Figure 12. However, change in the college’s name, the Senior Capstone, and mix of

learning modalities were overall considered only slightly important. Paths of Study were viewed by respondents as between “slightly” and “somewhat” important.

The survey also sought to gauge current student interest in the proposed curricular areas under consideration as shown in Figure 13. Responses to this question topped out at an aggregate score of 1.65 (on a scale of 3 (very interested) to -1 (not at all interested), reflecting a relatively low level of interest in these areas on the part of current students. This likely reflects that they already have a curricular focus not reflected in these proposed offerings. Responses to a related question about options not shown that they would like to study were wide-ranging but included a high proportion of science-related topics.

What is your first reaction to the model?

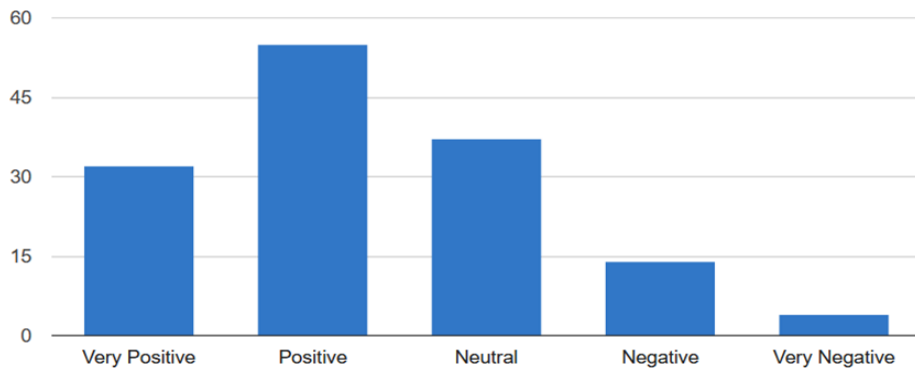


Figure 11. Responses to student survey Q1, “What is your first reaction to the model?”

Feature	Score
9. Continued ability to craft your own degree program	2.61
3. Enhanced Advising and Student Support	2.26
8. Revised transcript that shows potential employers and grad schools what you can do	2.22
6. Greater availability of experiential learning such as internships or field experiences	2.21
7. Equity and Inclusion as central values	2.12
2. Certificates and credentials that show student achievement and competencies	1.95
5. Paths of Study that emphasize transparency, predictability and rigor	1.76
10. Emphasis on "place-connected, place-committed" learning	1.66
4. Mix of on-campus hybrid (mostly remote, but some face-to-face instruction on campus), and low-residency or distance learning options for programs and classes	1.52
1. Senior Capstone Project	1.38
11. "Evergreen State University"	1.32

Figure 12. Responses to student survey Q2, “Below is a list of features of the proposed model of the college. How important is each feature to you?”

Focus	Score
1. Climate Justice and Sustainability	1.65
2. Art/Design/Media/Design/Technology/Computer Science	1.57
4. Living Lands study of our regional ecosystem	1.45
5. Enhanced number of business/entrepreneurship/nonprofit management programs and classes	1.37
3. Enhanced number of psychology/social work programs and classes	1.34
6. Transformative Justice: Legal Studies and Prison Education	1.28
7. Enhanced gender, sexuality and LGBTQ studies	0.94

Figure 13. Responses to student survey Q4, “Here are some areas of the curriculum we may add or expand as part of this initiative. Which of the following areas would you be interested in studying?”

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