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Tuition Resets
To Do or Not To Do

By John T. Lawlor

About the Author

John T. Lawlor, principal and founder of The Lawlor Group and publisher of *The Lawlor Review*, is a veteran leader in higher education marketing who brings a breadth of perspective and a depth of understanding for determining successful strategic brand and integrated marketing communications solutions. He has successfully worked with more than 250 private colleges during the course of a marketing career that spans over 35 years.

Since working with Concordia University, St. Paul to plan and implement its tuition reset, The Lawlor Group has advised and assisted two other institutions in resetting their tuition prices: Converse College (South Carolina), whose tuition reset took effect in Fall 2014, and Utica College (New York), whose tuition reset takes effect in Fall 2016. The Lawlor Group has also engaged in numerous discussions and research studies about doing tuition resets with other colleges, but in those cases concluded a tuition reset was simply not feasible or viable.

If you would like to learn more about The Lawlor Group, please check out our website at **www.thelawlorgroup.com**, email us at **tlg@thelawlorgroup.com**, or call us at **1.800.972.4345**.

Tuition Resets
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Tuition resets are not meant for most schools. But it's not because tuition resets have been maligned by pundits who form their opinions by looking only through the narrow lens of preconceived biases or by judging the miscues of tuition resets that were implemented only as promotional tactics. Rather, it's because in a dynamic and evolving higher education marketplace that demands customized, data-driven solutions, not every institution is in a position to implement a tuition reset as a comprehensive strategic initiative.

Concordia University, St. Paul did just that. They utilized market intelligence to devise an intelligent solution to an unsustainable situation. The results of Concordia's 2013 tuition reset are getting attention—and pointing the way to a new paradigm for a subset of small private colleges and universities.

The Marketplace Challenges

For any tuition-driven college, it all starts with demographics. Each year, the U.S. Department of Education predicts how many students will attend college during future years based on patterns in K-12 grade progressions and college-going rates. Given those projections and with all other factors remaining equal, a college could expect to naturally grow its enrollment—and thereby its tuition revenue—only about 1.4% per year for the next nine years (see Figure 1).

Figure 1: Projected Undergraduate Enrollment at Four-Year Colleges and Universities

Fall Term	Projected # of undergraduates at 4-year institutions	Annual growth
2015	10,269,000	--
2016	10,381,000	1.1%
2017	10,587,000	2.0%
2018	10,778,000	1.8%
2019	10,917,000	1.3%
2020	11,029,000	1.0%
2021	11,179,000	1.4%
2022	11,337,000	1.4%
2023	11,516,000	1.6%
2024	11,645,000	1.1%

Source: NCES

But during the nine years leading up to 2012-13 (the latest year of available data), expenditures at private nonprofit institutions increased at almost four times that rate, an average of 5.3% annually.

Tuition revenue contributes about 40% of all revenue at America's private baccalaureate nonprofit colleges and universities, so for all practical purposes, these institutions must depend on their tuition revenue increasing enough to keep pace with their increasing expenditures.

Enrollment managers have long employed many tactics to boost their tuition revenue beyond what could be expected due to natural population/college-going growth in the marketplace alone. But marketplace forces are making it harder and harder for these tactics to work at all but the elite private colleges.

Tactic #1: Keep Raising the Tuition Price

Consumers in the higher education marketplace accept that tuition prices will go up over time, just as the prices of almost all products and services do. The problem is how rapidly tuition has increased to the price point it has reached at private colleges.

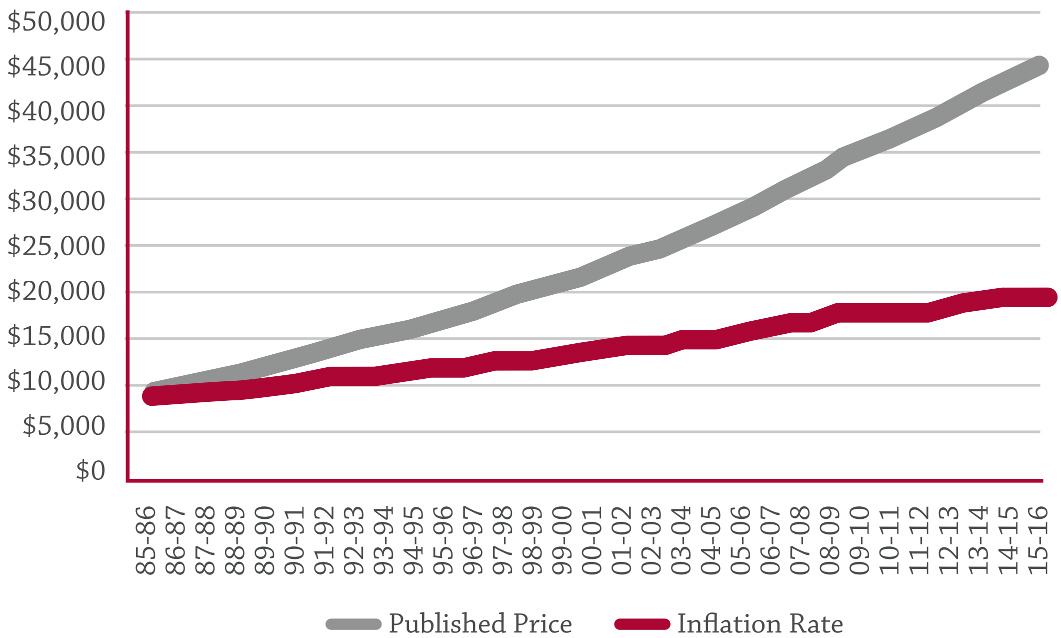
Sticker Shock

Parents of all income levels are shocked by today's tuition prices. Consider that 42% of Americans aged 25 and older have never gone to college themselves. And those who did go to college probably attended a public one, since only about 15% of undergraduates enroll at a private nonprofit institution.

But even the approximately one in 12 adults who went to a private college or university likely use as their frame of reference the price when they attended. If that was 30 years ago and they assume tuition increases were only keeping pace with inflation, then they will underestimate the average sticker price at a private college by almost $24,000 (see Figure 2), because it's now more than double what they think it should be.

Studies show this "sticker shock" does have an impact on consideration of a college. For instance, the Sallie Mae survey for "How America Pays for College 2015" found that 46% of college-bound students and their parents reported eliminating a college due to its cost before ever applying to it. This implies they could have been judging the cost by the published price alone, and not by their potential net price after any institutional grant or scholarship aid was applied.

Figure 2: Published Price at Four-Year Private Nonprofit Institutions Over Time



Source: College Board

Marketplace Misalignment

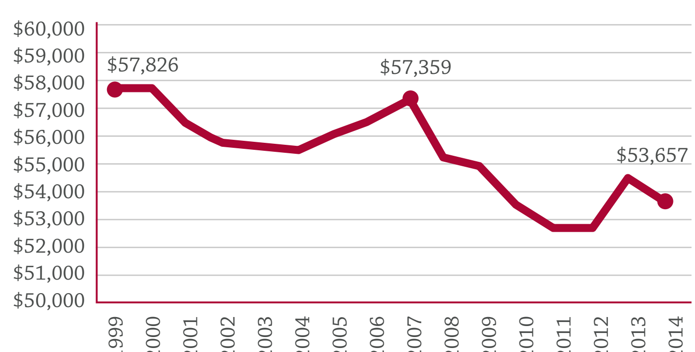
The sticker price of tuition can also be problematic because students and families base their expectations of quality upon it. The higher a college's sticker price, the more highly critiqued its value and worth is likely to be. So sometimes the sticker price puts a college in a "better league" than it can compete in, especially when it comes to maintaining an attractive campus with the most up-to-date equipment and modern facilities and amenities.

For example, there are three Catholic, Hispanic-serving institutions located in San Antonio, Texas. The sticker price of tuition and fees for each of them ranges between $26,000 and $28,000. Yet one institution has an endowment value of $174+ million, another's is valued at only 69% of that amount ($120+ million), and the third institution needs more than six times what it has for an endowment ($27+ million) to catch up with the wealthiest of the three institutions. This disparity can be consequential when it comes to student satisfaction. And indeed, the first two institutions rank above the national average (67%) for the percentage of students who return after their first year (73% and 69%, respectively), while the third lags behind at 56%.

Ability to Pay

Arguably the biggest problem with raising the tuition price in order to gain more tuition revenue is that it won't work if too many families lack the ability to pay more than they are already paying. And there's evidence they actually can't, since middle-class incomes still haven't returned to their pre-recession levels (see Figure 3).

Figure 3: Inflation-Adjusted Median Household Income Over Time



Source: U.S. Census

Despite this falling/stagnant income trend that most Americans have experienced, the average total published price at private nonprofit institutions increased an inflation-adjusted $5,826 between 2007 and 2014.

As a result, colleges had to boost their institutional aid awards for undergraduates, greatly tempering the tuition price increase's ability to raise revenue by itself. In fact, NACUBO's tracking of the discount rate at private colleges and universities found that it increased from 39.1% in 2007 to 48% in 2014 for first-time, full-time freshmen.

Tactic #2: Reduce the Discount Rate

Realizing they'll be compelled to increase institutional aid to needy students to counteract a tuition increase, institutions often attempt to raise tuition revenue by enrolling a greater proportion of no-need students to reduce their overall discount rate. For a variety of reasons, this isn't really working either.

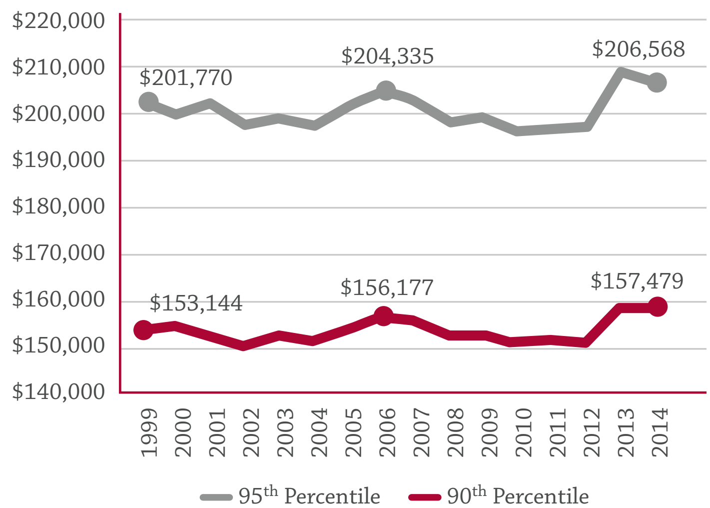
Willingness to Pay

Even among the wealthiest Americans, inflation-adjusted household income hasn't changed much during the past 15 years, increasing only about 2.5% (see Figure 4). By comparison, the inflation-adjusted average published price at private nonprofit institutions increased 38% during that same period.

So even though they may have the ability to pay, willingness to pay is an issue among the families of no-need students. With so many college options to choose from, they are in a good bargaining position to expect offers of merit aid from private colleges and universities.

And indeed, a 2014 analysis by *The Dallas Morning News*, *The Hechinger Report,* and the Education Writers Association found that thanks to merit aid, middle-income and wealthy families were affected less than low-income families by the inflation-adjusted $1,500 average net price increase at private nonprofit institutions between 2008-09 and 2011-12. While the increase worked out to about $1,700 for families in the lowest income group, it was only about $850 for middle-income families and $1,200 for families in the top income group.

Figure 4: Real Household Income at the 90th and 95th Percentiles Over Time



Source: U.S. Census

New Transparency

Another reason colleges are having a hard time reducing their discount rate is because families now have a better window into what they can expect for their net price. The new version of the U.S. Department of Education's College Scorecard allows anyone to compare the average net price of colleges and universities. And it even breaks down the net price according to family income brackets, with breaks at $30,000, $48,000, $75,000, and $110,001+.

The College Scorecard is also allowing families to compare the average amount of federal student loan debt that a college's students owe upon graduation, along with the percentage of that college's students who receive federal loans. This is significant now that student loan debt has risen to the forefront of national political and policy discussions, giving families more of an aversion to it. In fact, *Inside Higher Ed*'s 2015 survey of admissions directors at private colleges and universities found that 87% of them think their institution is losing potential applicants due to concerns about accumulating student loan debt. This is forcing many colleges to increase the amounts of their institutional grants (often unfunded) in order to decrease the loan amounts in their financial aid packages—again, making it difficult to reduce their discount rate.

Tactic #3: Gain Market Share

The next way to increase tuition revenue is to simply enroll more students. But this is easier said than done for several reasons.

Geography is Destiny

The vast majority of first-year students at four-year institutions choose an in-state college or university—72% nationally. And 57% of them attend one that is within 100 miles of their hometown.

That means an institution's "backyard" is its primary recruitment area. But population growth varies greatly by geographic region, with future declines in public high school students anticipated in two regions—the Northeast and the Midwest—that also have a high number of private institutions competing with each other (see Figures 5 and 6).

Figure 5: Actual and Projected Changes in Public High School Enrollment by Region

Region	Public High School Students: Actual % change from 2007 to 2012	Public High School Students: Projected % change from 2012 to 2024
Northeast	-5.8	-3.9
Midwest	-6.5	-1.3
South	1.5	8.0
West	-1.1	6.9

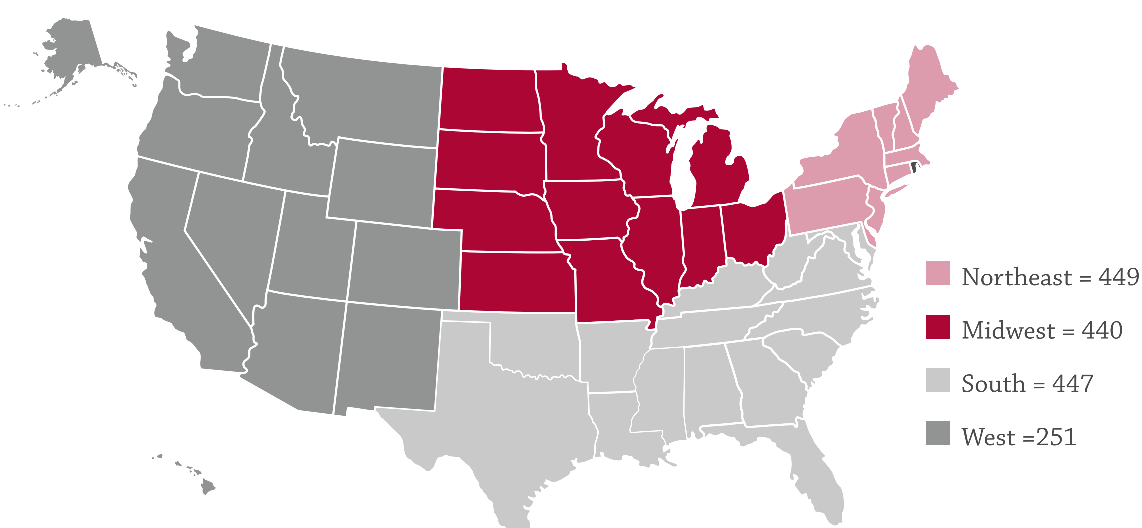
Source: NCES

Growth in Students of Color

Even if an institution enrolls more students, it might not be an efficient way to increase tuition revenue. Consider again the projected enrollment growth from Figure 1. At all postsecondary institutions during the next nine years, less than a third of the growth in the number of college students will come from white students (see Figure 7). So two out of every three additional students between now and 2024 will be students of color.

In past years, black and Hispanic households have earned less income than white households and have been more likely to earn income below the poverty level. In 2014,

Figure 6: Number of Four-Year Private Nonprofit Institutions by Region



Source: NCES

the median income of black households was just 59% of the median for white, non-Hispanic households, and 26.2% of black Americans were living in poverty, compared to 10.1% of white, non-Hispanic Americans. For Hispanic households of any race, the median income was 71% of the median for white, non-Hispanic households, and 23.6% of Hispanic Americans were living in poverty.

In 2011-12, the latest year of available data, 55% of white undergraduates received federal financial aid, compared to 75% of black undergraduates and 62% of Hispanic undergraduates. If these patterns hold, then gains in enrollment numbers will be accompanied by increases in the proportion of students with financial need.

It is fair to say that the sustainability of the financial model has come into question at America's small private colleges.

Figure 7: Projected Racial/Ethnic Composition of Year-to-Year Increase in College Students

	White	Black	Hispanic	Asian	Native American	Two or More
2016	20.9%	35.9%	36.9%	3.5%	0.0%	2.9%
2017	40.0%	25.2%	26.5%	5.1%	0.3%	2.9%
2018	42.7%	21.8%	26.1%	6.1%	0.4%	2.9%
2019	36.3%	22.9%	30.4%	7.2%	0.4%	2.9%
2020	23.1%	28.3%	38.0%	7.4%	0.3%	2.9%
2021	32.4%	24.6%	31.4%	8.3%	0.5%	2.9%
2022	35.4%	22.1%	30.3%	8.9%	0.4%	2.9%
2023	33.6%	23.7%	31.5%	8.0%	0.3%	2.9%
2024	21.1%	25.1%	40.8%	10.0%	0.1%	2.9%
9-Year Average	31.7%	25.5%	32.4%	7.2%	0.3%	2.9%

Source: NCES

Lack of Distinction

Gaining market share beyond natural population growth means enrolling students who would otherwise go to a competitor institution—which, in turn, requires an institution to differentiate itself from its competitors in audience-targeted ways.

Polling for Northeastern University's Innovation Imperative series indicates that "figuring out the best option or fit" was an obstacle to 82% of 16- to 19-year-olds during their college search. So there is great opportunity for colleges that can home in on the sweet spot where there's overlap among what is relevant to the student, what is a genuine strength of the institution, and what the institution offers that its competitors do not or cannot. If there is too much sameness, then it becomes a commodity market situation in which the lowest cost prevails.

Unsustainable Trajectory

Due to all of these challenges in generating more tuition revenue, Moody's Investors Service has predicted higher closure rates among small colleges through 2017, defining "small" as private colleges with operating revenue below $100 million and public colleges below $200 million. Despite upgrading the outlook for the entire U.S. four-year higher education sector from negative to stable this summer, the ratings agency warned, "Pockets of stress will persist with roughly 20% of public and private universities experiencing weak or declining revenue growth owing to limited pricing flexibility and fundamentally challenged student demand."

It is fair to say that the sustainability of the financial model has come into question at America's small private colleges. In fact, *Inside Higher Ed*'s 2015 survey of business officers at private nonprofit institutions found only 42% of them are confident about the sustainability of their institution's financial model over the next 10 years.

Concordia's Tuition Reset Strategy

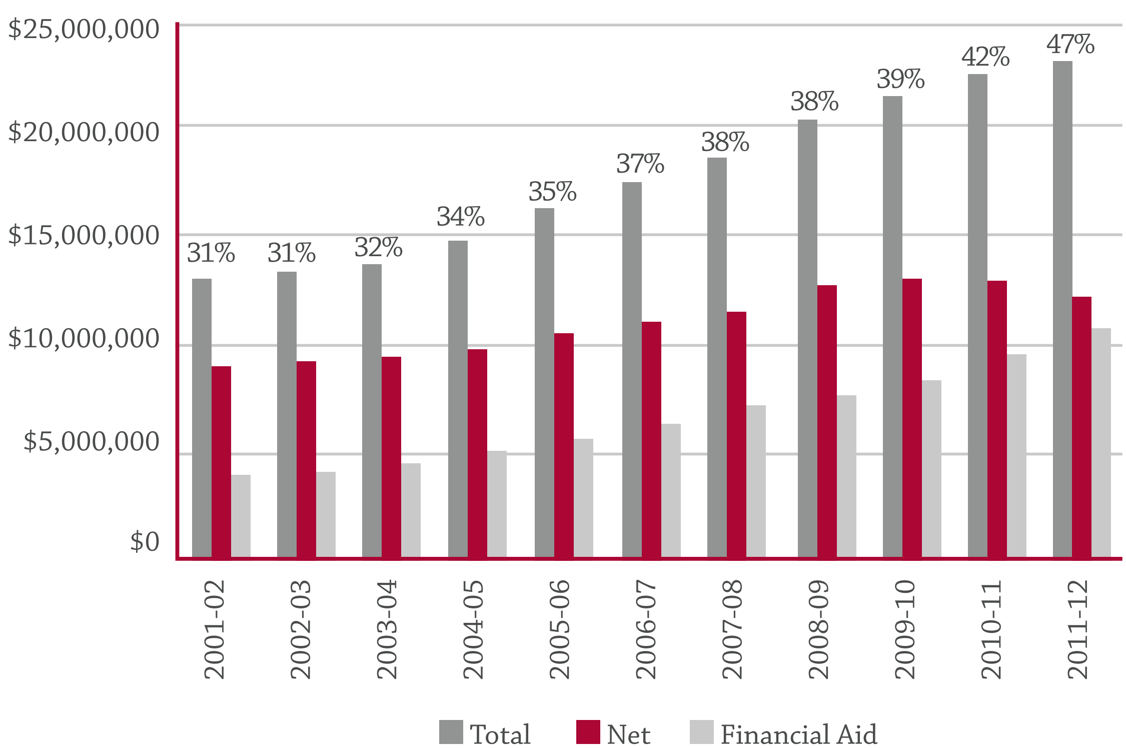
As a small private institution with operating revenue far below $100 million, Concordia University, St. Paul has been on alert for years regarding the marketplace challenges to revenue growth. Concordia is a Christian liberal arts university (one of 10 operated under the auspices of The Lutheran Church–Missouri Synod) that offers undergraduate, graduate, adult degree-completion, and continuing education programs both at its St. Paul, Minnesota, campus and online.

In Fall 2010, Concordia faced a particularly glaring warning sign: After eight consecutive years of increases, net tuition revenue from its traditional (residential) undergraduate program dropped. Even though its tuition price and its enrollment number both climbed, the total amount of institutional aid Concordia awarded also increased in excess of revenue gains. And despite enrollment keeping pace the following fall, Concordia's discount rate rose even more sharply and net tuition revenue dropped even further (see Figure 8).

At that time, Concordia was also concerned that it had a pricing perception problem among prospective students—including those in demographic niches it was best positioned to serve, such as students from low-income urban families and students who are drawn to its church work programs. Concordia surmised the following with regard to its published tuition price:

- **"Sticker shock" was blocking many students with financial need from applying.** Concordia's published price for tuition and fees was higher than at 63% of Minnesota's four-year institutions, which was masking the fact that Concordia enrolls students from somewhat less affluent communities than similarly priced private colleges in its competitor set.
- **More of its admitted students were choosing lower-cost schools instead of Concordia.** This was consistent with research findings from the Minnesota Private

Figure 8: Concordia's Traditional Undergraduate Tuition Revenue and Discount Rate Trends



College Council indicating an increase in preference for public institutions among college-bound students statewide.

- **"Unwillingness to pay" was blocking students with the ability to pay from enrolling.** A substantial proportion of admitted students who enrolled elsewhere chose a private competitor, presumably because these institutions had more reputational strength than Concordia at a similar price.

Factoring in its net tuition revenue and discount rate trajectories alongside its market position, Concordia concluded that it could not sustainably continue to increase its financial aid to overcome its price as a barrier to enrollment.

Intensive Planning

During the 2011-12 academic year, Concordia began working with Noel-Levitz and The Lawlor Group to determine whether a tuition reset could solve both its net tuition revenue problem and its marketplace perception challenges.

A tuition reset involves moving away from a high-price/high-discount model by decreasing the published price substantially and adjusting the average institutional aid award down proportionately. The result is approximately the same amount of net tuition revenue after the reset as before. The price is lower, yet so is the discount.

The benefit of a tuition reset to the institution is that it can result in an enrollment boost thanks to the widespread publicity generated by such a drastic tuition decrease during a time of almost universal tuition increases. (But that publicity is a double-edge sword, because there is a danger that the price cut could be viewed as a desperate move by a struggling college.) Longer term, having a published price that does not induce so much "sticker shock" and that better reflects the college's real market position can result in more families considering it to be a financially viable option for them, thereby also boosting enrollment.

The presumption was that people would only consider a much lower tuition amount to be "a great price" if it's for "a great product."

Concordia, however, also wanted to make sure its students—current and prospective—would benefit tangibly from a tuition reset, given that is it a mission-driven institution. Therefore, Concordia was willing to decrease its published price *more* than it would be decreasing its discount, so that all of its students would see an actual decrease in their out-of-pocket cost. That is, Concordia wanted its tuition reset to genuinely function as an affordability initiative.

The first thing to determine was whether a tuition reset was even doable for Concordia according to the numbers. As Noel-Levitz conducted the financial modeling for a tuition reset, it became apparent that several institutional factors would work to Concordia's benefit. Significantly, none of its current students were paying the full tuition price, so that reduced how much money it would be "leaving on the table" in reducing its price. Concordia also had some great fundamentals, including diversified revenue streams, low overhead and careful expense management, growing endowment value, and record high total enrollment. These factors placed Concordia in a position of strength for resetting its tuition price.

So the next question was whether Concordia could overcome the risk that a tuition reset would be seen as a sign of desperation. The presumption was that people would only consider a much lower tuition amount to be "a great price" if it's for "a great product." So The Lawlor Group conducted an assessment of Concordia's value proposition and identified several authentic positive assets:

- Concordia's culture of caring for students results in value-added support and guidance for their success.
- The curriculum is geared toward practical and experiential learning to prepare students for the workplace not only broadly, but also specifically.
- Concordia's in-demand course offerings, flexible degree programs, and transfer-friendly policies are all relevant to its marketplace.
- Their Concordia education and connections result in good job placement for new graduates, who are highly regarded by area employers.
- The faith-based aspect of Concordia's educational experience is value-added in terms of helping students find paths for meaningful living.

Moreover, thanks to its fiscal resourcefulness and prudent management, Concordia had been operating within core revenues of tuition and auxiliary services, which would place the university in a position to pursue a tuition reset without having to cut or eliminate anything from the educational experience in or out of the classroom.

The Lawlor Group advised Concordia to implement a branding campaign that would firmly establish its value messaging prior to a tuition reset announcement. Posters, campus banners, and table tents all rallied the internal campus community around a new tagline: *Responsive. Relevant. Real.* As an authentic expression of Concordia's institutional identity, the tagline caught on quickly and gave faculty and staff a framework for talking about the ways that Concordia delivers value.

Meanwhile, Concordia worked with Noel-Levitz to determine what its exact reset price and financial aid awards should be. After extensive modeling and risk assessment, college leaders settled on a price decrease that was large enough to get attention and an institutional aid decrease that was small enough to ensure students would realize savings. Concordia took a calculated risk that enrollment would increase enough to cover its loss of revenue per student.

The published price of tuition and fees was to drop by $10,000, from $29,700 to $19,700, a 33.67% decrease.

In May of 2012, Concordia's Board of Regents unanimously approved a tuition reset for all new and returning students in its traditional undergraduate program for Fall 2013. The published price of tuition and fees was to drop by $10,000, from $29,700 to $19,700, a 33.67% decrease. Additionally, the room and board cost of $7,750 would stay the same for a total published price decrease of 26.7%, from $37,450 to $27,450.

Beginning in the winter of 2012 and continuing up to and beyond the actual announcement, The Lawlor Group collaborated closely with Concordia on carefully planning every detail of how its tuition reset would be rolled out and communicated in an effective manner. Considerations spanned everything from determining when and how to inform specific stakeholders, to event planning for the official announcement, to formulating a media plan for ongoing awareness purposes. The Lawlor Group took the lead on preparing an environmental scan of marketplace conditions and planning considerations, preparing campaign messaging, developing the communications plan and media plan, and training campus communicators.

For the internal campus community, communication components included customized letters to returning students specifying how the tuition reset would affect their individual circumstance and campus forums for open discussion. Emails about the tuition reset went out to various constituents, including faculty, staff, prospective students, and alumni. To convey a clear understanding about the real benefits of the tuition reset and how this important initiative was in alignment with Concordia's mission and legacy, a special issue of the university magazine went out not only to alumni and donors, but also to the parents of current students.

Activities associated with the announcement event included conducting outreach to local, regional, and national media sources, developing a press release and fact sheet, staging a press conference, and arranging media appearances. Publicity materials also included a dedicated section of the website for the tuition reset, an informational video, and an advertising campaign.

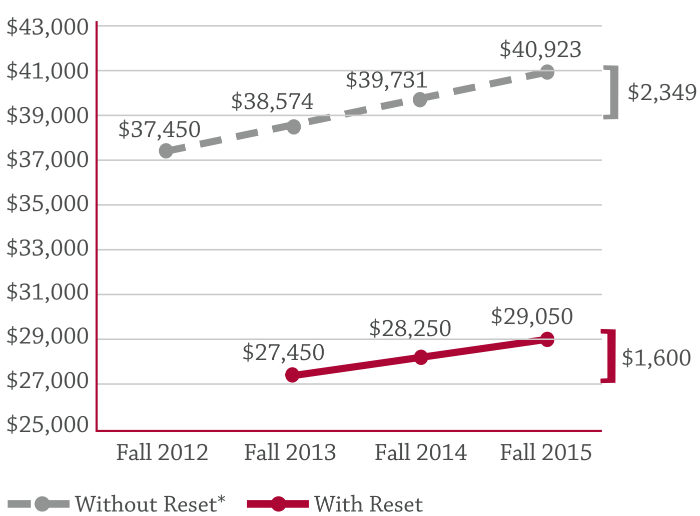
The tuition reset for Fall 2013 was publicly announced on September 12, 2012, to wide acclaim from students, parents, alumni, and local and state government office-holders. The media coverage spanned from Twin Cities television stations, radio stations, and newspapers to national higher education publications to the mainstream national media (see http://www.csp.edu/admissions/value/tuition-reset/ for a listing).

The Results for Concordia

The tuition reset was calculated to serve both as a "market correction" to enhance Concordia's value-for-cost and as a "model correction" to get the institution off of a financially unsustainable path. Now that three class years of students have been recruited and enrolled under the terms of the tuition reset, Concordia has experienced measurable results.

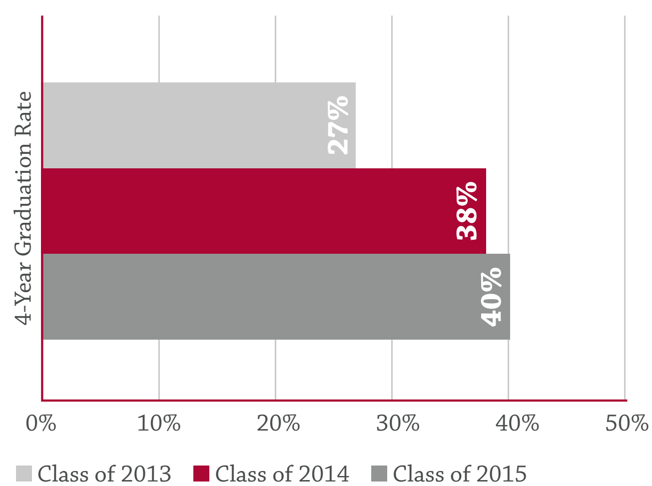
In positioning the tuition reset as a college affordability initiative, Concordia wanted to provide true cost savings to its students so they could remain enrolled and persist through to graduation. During the first year of the tuition reset, the out-of-pocket cost to every returning student dropped a minimum of $1,400, with families that did not qualify for need-based aid saving even more. The reset price also lowered the dollar amount of subsequent annual tuition increases (see Figure 9). Since the reset, Concordia's persistence rate to graduation has gone up 13 percentage points (see Figure 10), and the average amount of student loan debt for its graduates has decreased by 18% (see Figure 11).

Figure 9: Difference in Concordia's Annual Tuition Increases



**assuming 3% annual increase*

Figure 10: Concordia's Four-Year Graduation Rate



Concordia also hoped that enhanced awareness of its genuine worth thanks to the tuition reset would grow its student body, getting more underserved students to overcome sticker shock and becoming the first-choice college for more middle-class families. The tuition reset has given Concordia the most affordable published price among its private college competitors (see Figure 12). For the fall semesters of 2013, 2014, and 2015, Concordia enrolled an average of 19 more Pell-eligible students per year than in Fall 2012, and an average of six more no-need students per year. Enrollment in the traditional undergraduate program has increased by 17% (see Figure 13).

Figure 11: Average Student Loan Debt of Concordia Graduates

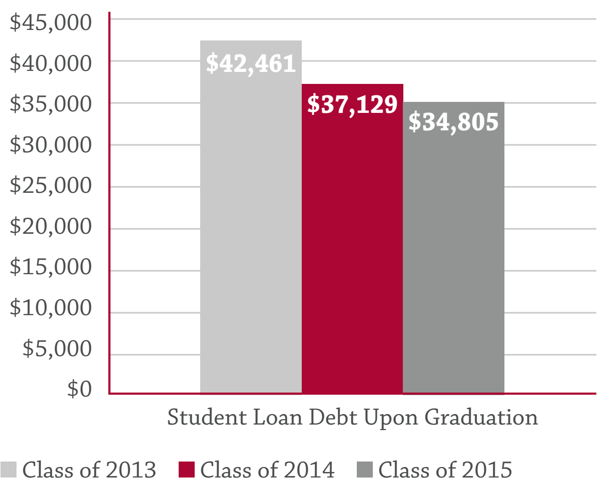


Figure 12: Published Price Comparison

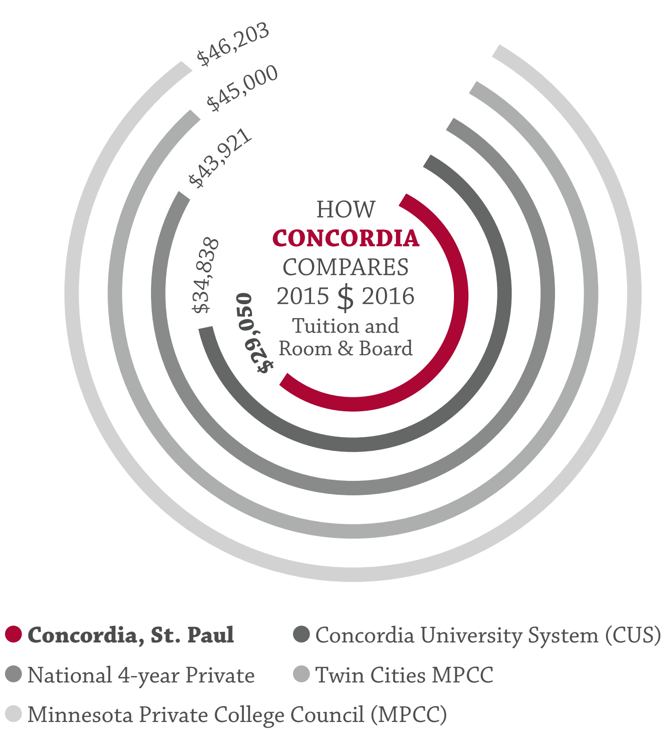


Figure 13: Concordia's Traditional Undergraduate Enrollment

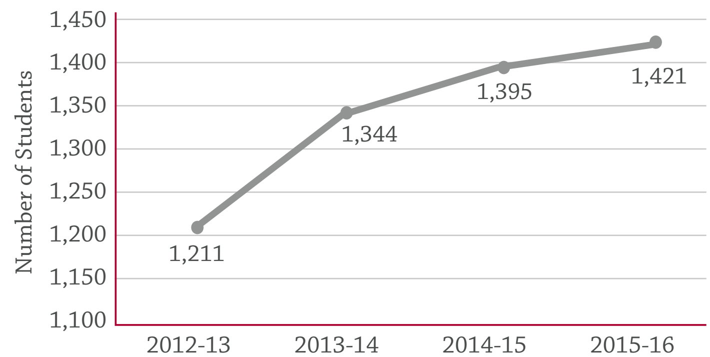


Figure 14: Concordia's Discount Rate

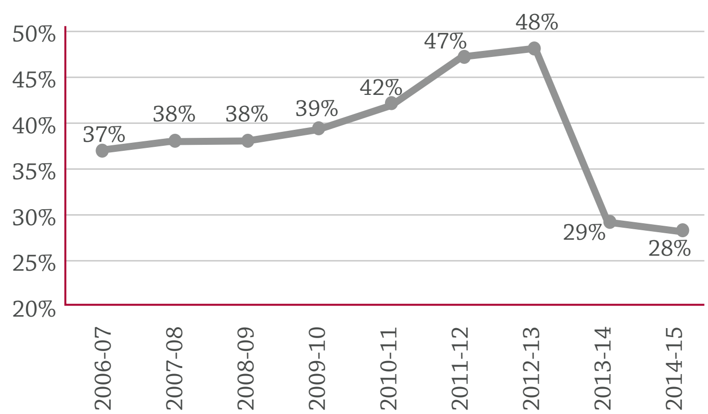
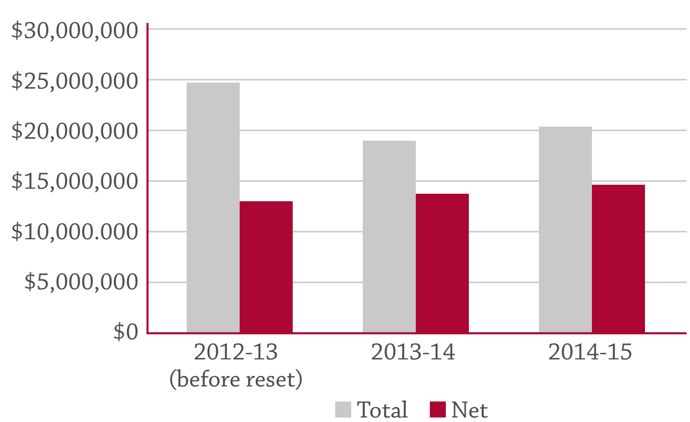


Figure 15: Tuition Revenue from Concordia's Traditional Undergraduate Program

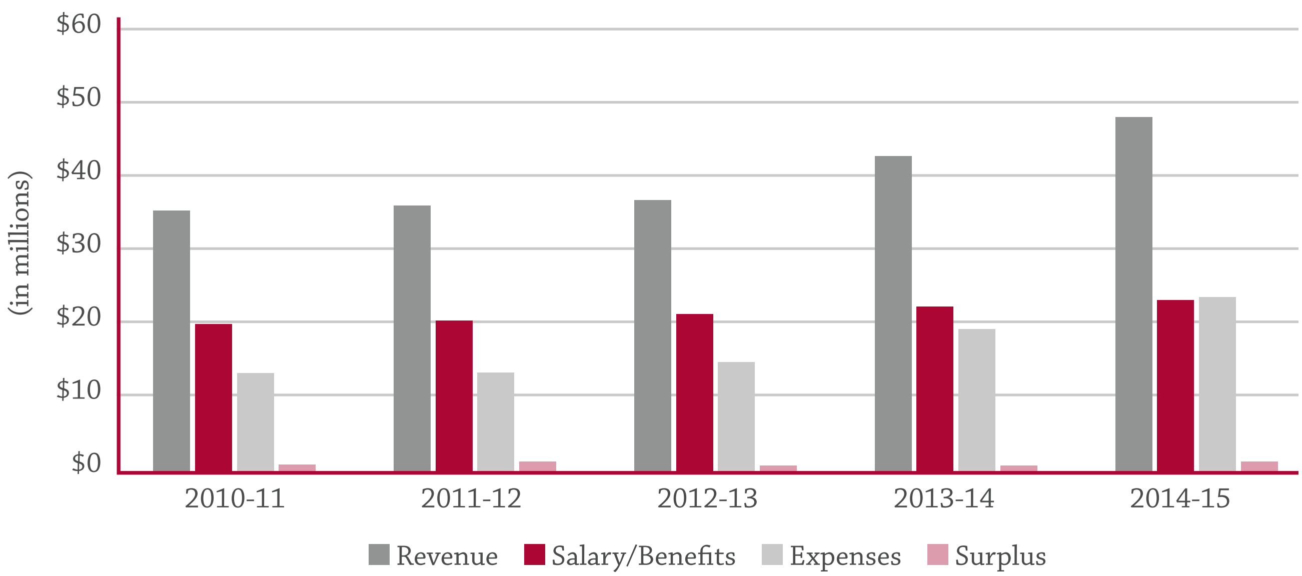


To get off the unsustainable path of its high-price/high-discount model, Concordia intended for its tuition reset to decrease its discount rate and increase its net tuition revenue. The discount rate decreased by 19 percentage points in 2013 and has remained stable (see Figure 14), and net tuition revenue from the traditional undergraduate program increased 14% during the first two years (see Figure 15). Institution-wide, Concordia has continued to experience budget surpluses since the reset (see Figure 16). The increase in institutional revenue has allowed Concordia to hire additional faculty, increase course offerings, and add new academic programs, as well as upgrade technology and renovate classroom and student life buildings.

And finally, Concordia wished to lead by example in the national effort to improve college pricing. Since Concordia's tuition reset, college officials have been approached for consultation by more than 25 other colleges and universities that are considering their own tuition resets.

Given the continued positive results, Concordia's tuition reset has been a complete success—as a market correction, as a model correction, and as a leadership initiative for the good of students as well as the higher education industry.

Figure 16: Concordia's Budget Results



Tuition Reset Lessons Learned

A tuition reset that is implemented as a comprehensive strategic initiative can help solve several issues. It can correct the pricing perception problem (in the eyes of prospective students and families) that occurs when an institution's published cost is out of alignment with its market position. It can improve access for students who are put off by a high sticker price. It can improve affordability, such as among middle-class students who are taking on high debt. And it can replace the high-price/high-discount model with something more sustainable.

Yet even with strategic implementation, only a select few institutions are primed for genuine success via a tuition reset. Those that are tend to have several things in common:

- First, an institution must be operating from **a position of institutional strength** in terms of enrollment numbers, financial stability, and revenue streams. This is especially true because a tuition reset involves significant up-front expenses. An institution must be willing to absorb any potential losses during the first year of a tuition reset as the financial aid award model takes effect. And it also takes the proper investment of marketing dollars to generate awareness of—and sustain the momentum of—a tuition reset.

- Institutions also are in a better position to succeed with a tuition reset if they have **an innovative campus culture** and leaders who are responsive to the realities of the higher education marketplace, as well as to the needs of the students they serve. The board and administration will need to engage in data-based decision making, which requires ample time to plan, process, discern, and decide. But then to manage the actual change requires nimbleness and rapid response.

- And perhaps most importantly, the institution must be delivering **an educational experience of real value**. No matter what the published price or net price is, families will always expect a good return on their investment. A tuition reset can increase interest and consideration, but an institution still must offer an educational experience that results in student satisfaction and successful post-graduate outcomes. The core message of improved value from good quality at a lower price must be authentic.

When considering whether to do a tuition reset, "no" is probably the viable conclusion for most institutions. But for small tuition-driven private colleges with fiscal stamina that are able to embrace change and offer true value, a tuition reset can go a long way in boosting their brand equity in the marketplace. ■

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