The Power of Insight: Discover UPCEA Research & Consulting from Our Experts and Members

UPCEA Research & Consulting - Elevating Your Institution

Leading Today's Innovations

- With over a century of experience, we help institutions thrive with tailored, industry-specific insights.

Optimizing Your Resources

- Focused on solutions – we’re here to help you achieve more while staying aligned with your budget.

Turning Insights into Action

- We go beyond just delivering reports – our research turns into practical strategies that drive your institution forward.

A Shared Purpose

- We're in this together - committed to expanding access and improving outcomes for adult and non-traditional learners.

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UPCEA Research and Consulting Team

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URC Achieves Results By:

Strategic Synergy: Forge a dynamic partnership with the client to unearth institutional challenges.

Scope and Pricing Alignment: Ensure that the scope aligns with the identified issues and desired outcomes.

Initial Assessment and Issue Identification: Conduct thorough interviews and employ qualitative analysis tools, such as portfolio reviews, to pinpoint the root cause of the client's issue(s).

Collaborative Strategy Development: Engage with the client to collaboratively devise strategies and action plans.

Tailored Engagement: Leverage the identified root causes and strategic insights to drive effective solutions and transformative changes.

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Research Products

Portfolio Decision-making Model (PDMM) & Occupational Opportunity Model (OOM)

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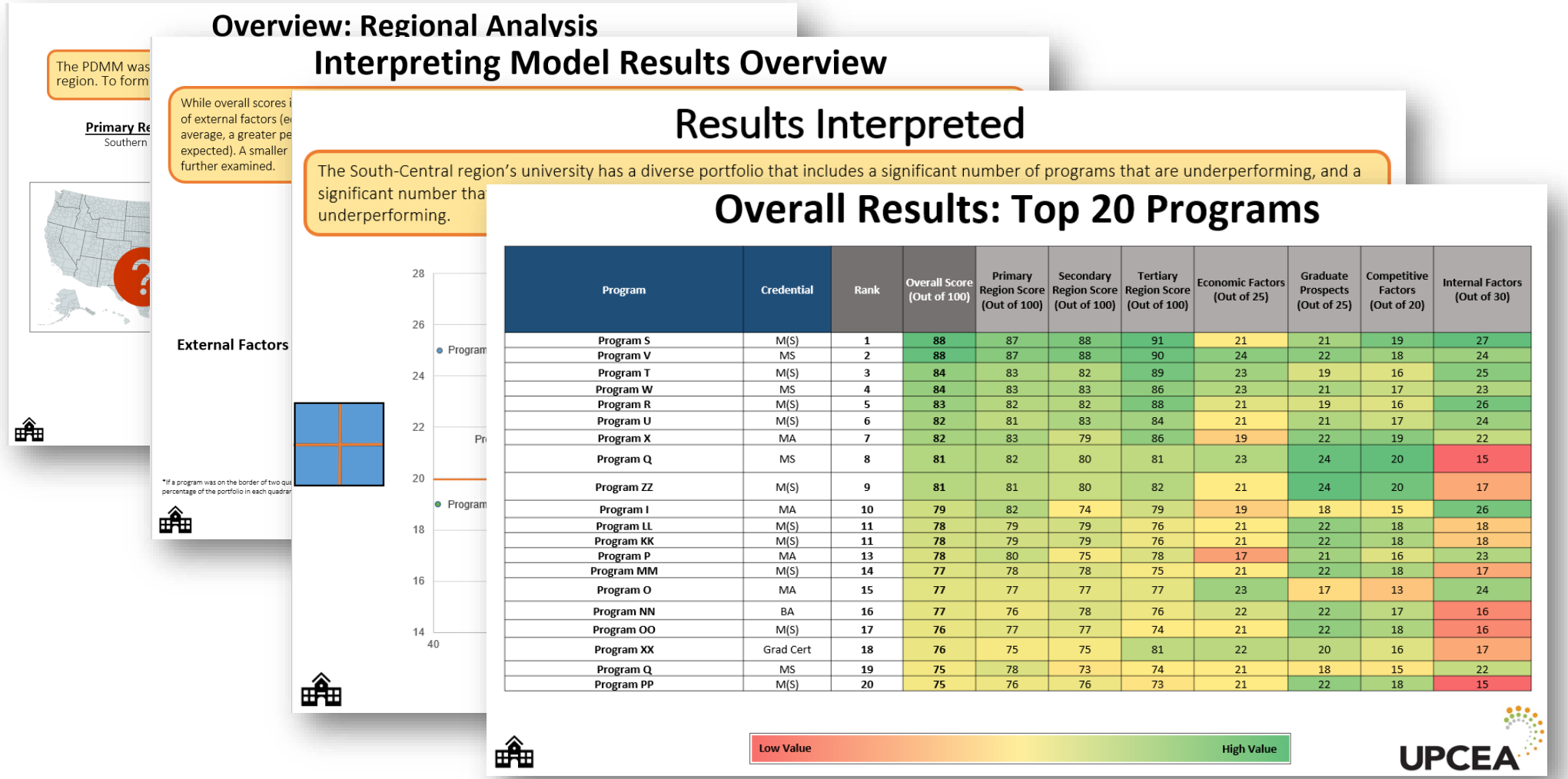
Portfolio Decision-Making Model (PDMM)

- Assesses Portfolio strengths and weaknesses by looking at market strength and internal (to client) performance metrics.
- Quantitative approach to understanding degree-program portfolio strengths and weaknesses.
- Model is run on three regions, selected in collaboration with the client.

Occupational Opportunity Model (OOM)

- Identifies occupational trends to identify market-driven opportunities.
- Begins with occupations, then looks at programs.
- Examines the top 200 occupations in a region.
- Typically conducted in tandem with a PDMM.
- The model is run on the same three regions as selected for the PDMM.

Portfolio Decision-making Model (PDMM)



Program	Credential	Rank	Overall Score (Out of 100)	Primary Region Score (Out of 100)	Secondary Region Score (Out of 100)	Tertiary Region Score (Out of 100)	Economic Factors (Out of 25)	Graduate Prospects (Out of 25)	Competitive Factors (Out of 20)	Internal Factors (Out of 30)
Program S	M(S)	1	88	87	88	91	21	21	19	27
Program V	MS	2	88	87	88	90	24	22	18	24
Program T	M(S)	3	84	83	82	89	23	19	16	25
Program W	MS	4	84	83	83	86	23	21	17	23
Program R	M(S)	5	83	82	82	88	21	19	16	26
Program U	M(S)	6	82	81	83	84	21	21	17	24
Program X	MA	7	82	83	79	86	19	22	19	22
Program Q	MS	8	81	82	80	81	23	24	20	15
Program ZZ	M(S)	9	81	81	80	82	21	24	20	17
Program I	MA	10	79	82	74	79	19	18	15	26
Program LL	M(S)	11	78	79	79	76	21	22	18	18
Program KK	M(S)	11	78	79	79	76	21	22	18	18
Program P	MA	13	78	80	75	78	17	21	16	23
Program MM	M(S)	14	77	78	78	75	21	22	18	17
Program O	MA	15	77	77	77	77	23	17	13	24
Program NN	BA	16	77	76	78	76	22	22	17	16
Program OO	M(S)	17	76	77	77	74	21	22	18	16
Program XX	Grad Cert	18	76	75	75	81	22	20	16	17
Program Q	MS	19	75	78	73	74	21	18	15	22
Program PP	M(S)	20	75	76	76	73	21	22	18	15

[Sanitized PDMM Example]

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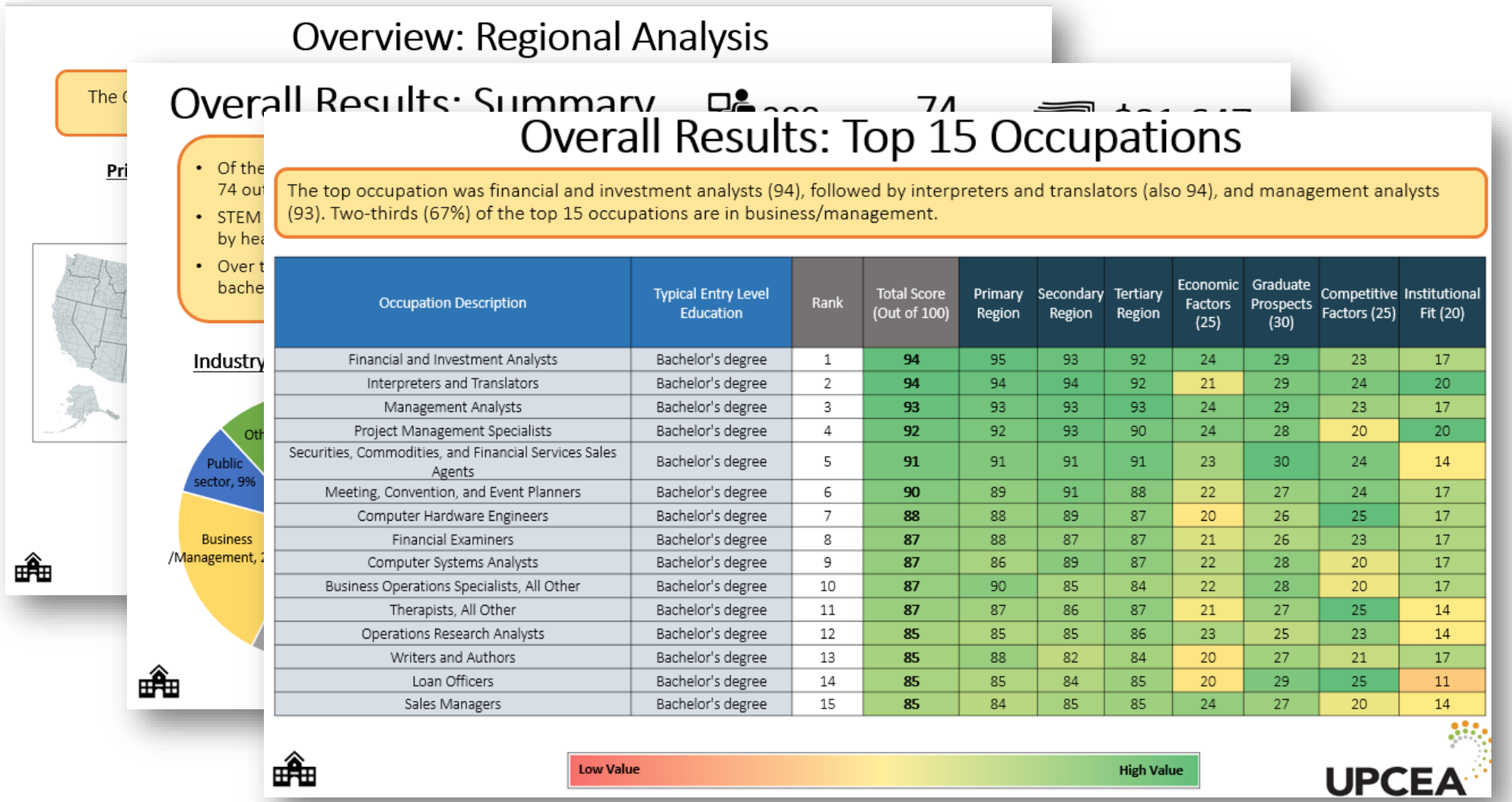
Occupational Opportunity Model (OOM)



Occupation Description	Typical Entry Level Education	Rank	Total Score (Out of 100)	Primary Region	Secondary Region	Tertiary Region	Economic Factors (25)	Graduate Prospects (30)	Competitive Factors (25)	Institutional Fit (20)
Financial and Investment Analysts	Bachelor's degree	1	**94**	95	93	92	24	29	23	17
Interpreters and Translators	Bachelor's degree	2	**94**	94	94	92	21	29	24	20
Management Analysts	Bachelor's degree	3	**93**	93	93	93	24	29	23	17
Project Management Specialists	Bachelor's degree	4	**92**	92	93	90	24	28	20	20
Securities, Commodities, and Financial Services Sales Agents	Bachelor's degree	5	**91**	91	91	91	23	30	24	14
Meeting, Convention, and Event Planners	Bachelor's degree	6	**90**	89	91	88	22	27	24	17
Computer Hardware Engineers	Bachelor's degree	7	**88**	88	89	87	20	26	25	17
Financial Examiners	Bachelor's degree	8	**87**	88	87	87	21	26	23	17
Computer Systems Analysts	Bachelor's degree	9	**87**	86	89	87	22	28	20	17
Business Operations Specialists, All Other	Bachelor's degree	10	**87**	90	85	84	22	28	20	17
Therapists, All Other	Bachelor's degree	11	**87**	87	86	87	21	27	25	14
Operations Research Analysts	Bachelor's degree	12	**85**	85	85	86	23	25	23	14
Writers and Authors	Bachelor's degree	13	**85**	88	82	84	20	27	21	17
Loan Officers	Bachelor's degree	14	**85**	85	84	85	20	29	25	11
Sales Managers	Bachelor's degree	15	**85**	84	85	85	24	27	20	14

[Sanitized OOM Example]

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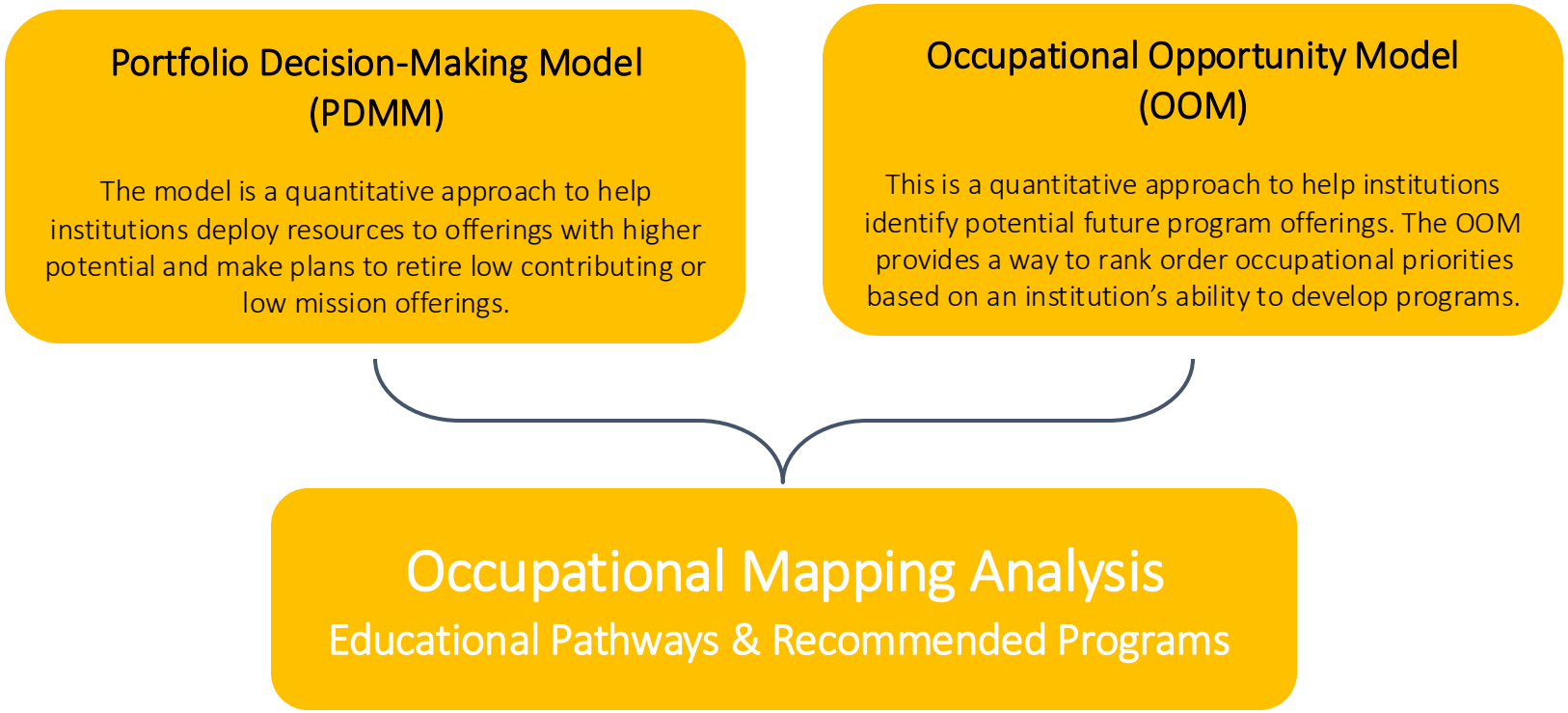
Occupational Mapping Analysis: The Building Blocks

The Portfolio Decision-Making Model (PDMM) and Occupational Opportunity Model (OOM) identify program growth opportunities in the institution's primary, secondary, and tertiary markets. The Occupational Mapping Analysis (OMA), a separate, comprehensive report, details the findings from each of the research studies used in this report.



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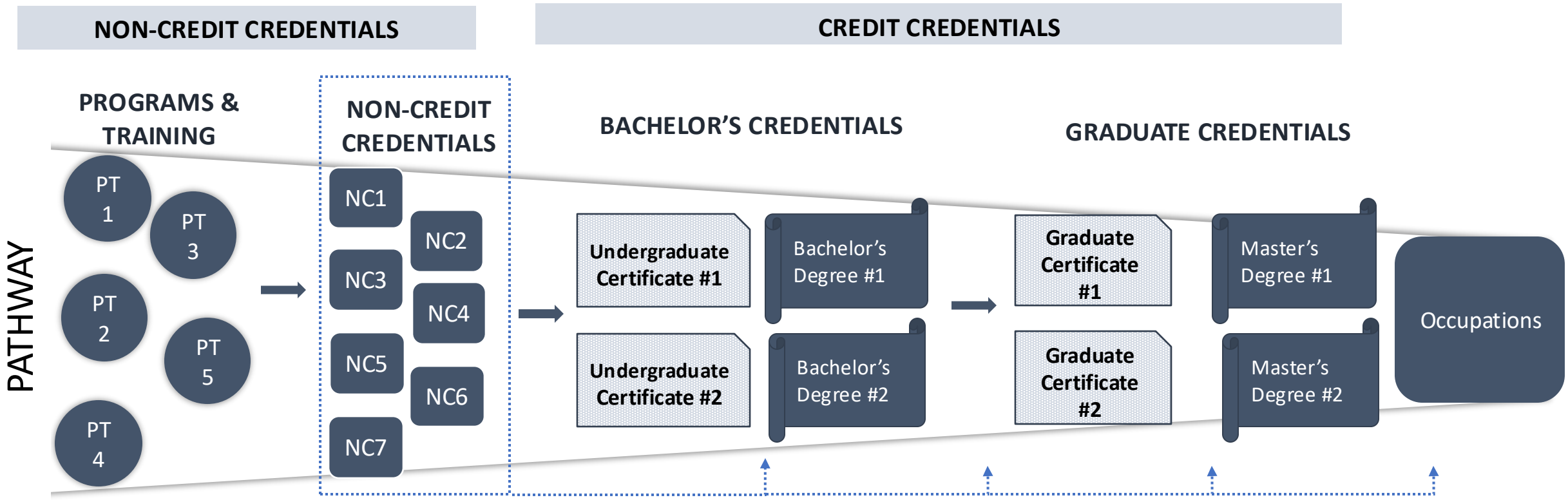
The Stackable Credential Pathway Map

The stackable credential pathway allows for occupation-related competencies to be translated into credit or non-credit programs that match the knowledge and skills that occupations in the institution's market area require.



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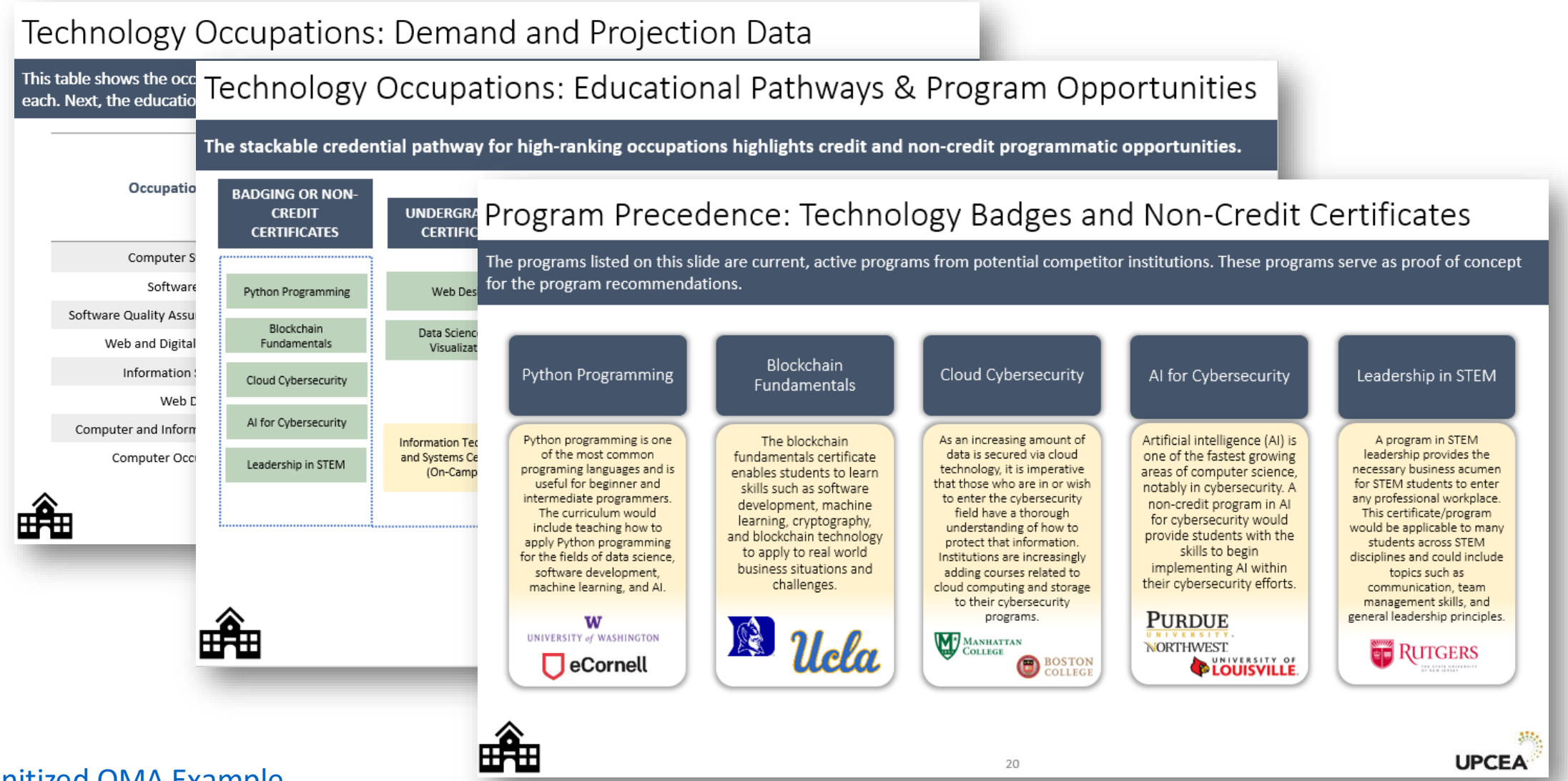
Occupational Mapping Analysis Example



[Sanitized OMA Example]

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Enrollment Process Review: Secret Shop

1. Identifies issues within the early part of the enrollment funnel.
2. Can be used for self-evaluation or competitive intelligence.
3. UPCEA has **benchmarking** for comparative assessments.

Between January 4, 2023, and January 21, 2023, UPCEA's Center for Research and Strategy conducted a secret shopper analysis of Institute of Higher Education's School of Professional, Continuing and Online Studies (IHE-SPCO). During that time, 30 unique requests for information on programs found on the SPCO website were made. Requests were made either through the request for information form (RFI), or an email was sent to the designated contact for a given program. Response time was measured only during traditional business hours, defined as 9:00 AM to 5:00 PM EST Monday through Friday. Designated federal holidays were removed from response time calculations. Responses were only counted if they were not automated. To protect the identity of secret shoppers and institutional staff, names are not included in this

Table 1: Secret Shopper Results

Inquiry Type	# of Inquiries	Average Response Time	Median Response Time	Best Response Time	Worst Response Time	# of Same Day Responses	Inquiries without Response
Overall	30	12:10	3:06	0:11	61:16:00	7	8
RFI Form	18	14:24	3:44	2:00	61:16:00	2	3
Emails	12	7:23	1:53	0:11	28:50:00	5	5

response, which suggests room for improvement. Additionally, there was inconsistency in the response processes.

- IHE-SPCO appears to have a robust automated system that routinely contacts individuals who have inquired about a program. This is an area of strength for the School. However, the School possesses a number of different avenues of inquiry, which result in inconsistent inquirer experiences and presents challenges for maintained communication. Some of this may be a result of form navigation and where inquiries are housed. **The inquiry process brought UPCEA shoppers to a number of different forms, owned by different stakeholders, which may make follow-up and reporting more challenging.**

Sanitized Enrollment Process Review Example

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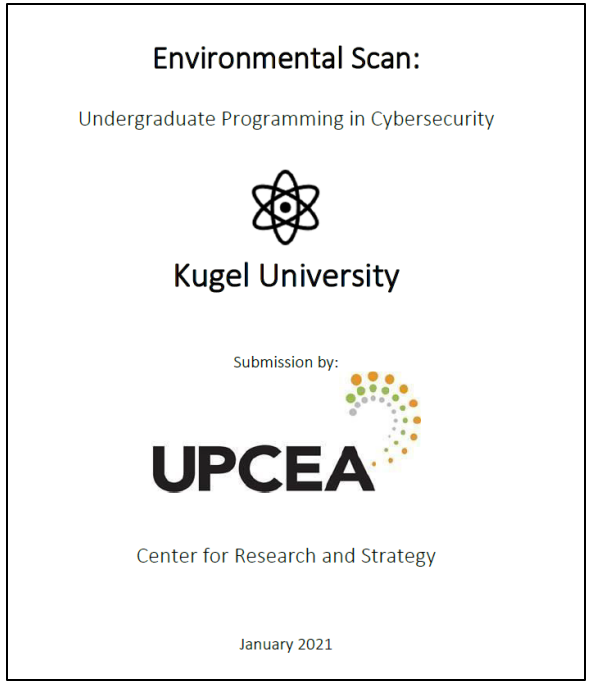
Feasibility Research and Enviromental Scans

An environmental scan or feasibility analysis can be employed to test program viability. Each report type includes trends, an occupational analysis, a competitive analysis, key findings, and recommendations.

Environmental Scan



Environmental Scan:

Undergraduate Programming in Cybersecurity

Kugel University

Submission by:

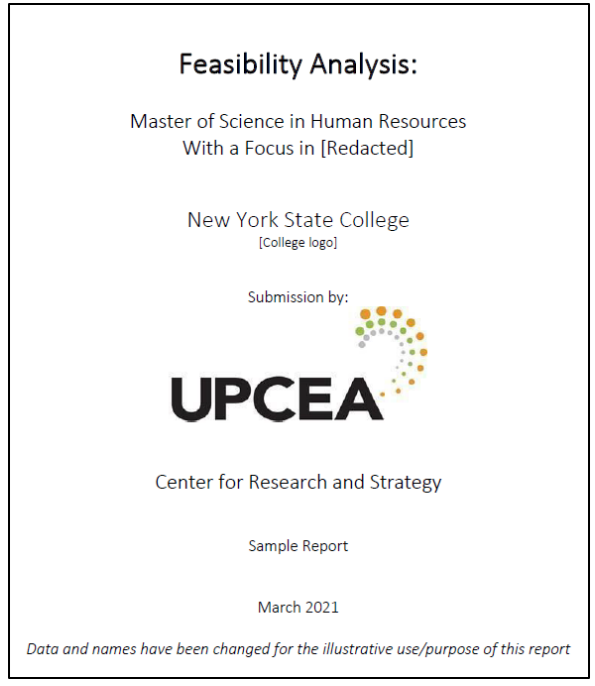
UPCEA

Center for Research and Strategy

January 2021

*Doesn't include primary research

Feasibility Analysis



Feasibility Analysis:

Master of Science in Human Resources
With a Focus in [Redacted]

New York State College
[College logo]

Submission by:

UPCEA

Center for Research and Strategy

Sample Report

March 2021

Data and names have been changed for the illustrative use/purpose of this report

*Includes primary research

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Benchmarking Research Overview

Q. What is Benchmarking Research?

A process for measuring key business metrics and practices and comparing the findings with an identified standard.

Two Types of Benchmarking:

- **Performance** is the process of gathering and comparing **quantitative** data.
- **Practice** is the collecting and comparing of **qualitative** data (e.g. work processes).

Two Applications:

- **Internal** is the process of collecting and comparing Performance or Practice metrics across departments or product lines, etc.
- **External** compares Performance and Practice metrics from one organization to another.

Source: apqc.org

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Why & What: UPCEA Benchmarking Research

Why UPCEA Conducts Benchmarking: UPCEA Benchmarking Informs consulting projects and supports members' business decisions.

UPCEA Biennial and Triennial Studies

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Consulting Engagements

Consulting Case Study 1: A nationally ranked, liberals-arts based university

Objective: Identify models that leverage growth opportunities for the University, as it pertains to online and professional education

Phase 1: Discovery

- Early On-Site Exploratory Visit and Review of Materials (Strategic Plan, Mission/Vision, etc.)
- Engage the Academic Deans, Senior Administrators and President

Phase 2: Market and Portfolio Analysis

- Portfolio Review
- Employer Interviews
- Alumni Survey
- Competitive Analysis
- Market Demographics

Phase 3: Structure, Process, and Climate Assessment

- Consultants On-Site to Review Processes and Engage Operational Units, President, Provost

Phase 4: Stakeholder Presentations and Engagement

- Dissemination of Results to Academic Leaders, President, Provost, Board of Trustees

Outcome: Established the School of Professional Studies

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Consulting Case Study 2: Land Grant University

Objective: Develop a strategic plan to explore the creation of a professional, continuing, and online entity and its components

Phase 1

Discovery

- Interview 40 internal stakeholders to better understand the strengths and weaknesses of existing decentralized model and potential appetite for change. The Phase 1 report outlined what organizational changes would allow the institution to better compete online

Phase 2

Understanding Strengths & the Competitive Landscape

- Review existing portfolio of programs with UPCEA's PDMM to determine which programs had the greatest potential. Leverage UPCEA benchmarking data, determine the location, staffing, and marketing budget of a new unit.

Phase 3

Articulating and Realizing Creation of Profession, Continuing, and Online Entity

- The culmination of the prior phases and provides additional analyses and insights for the institution as it moves forward. It incorporates additional staffing and organizational information, as well as providing greater detail in several operational areas.

Phase 3 Report

1) Objectives and Methodology
2) Market Factors and Considerations
3) Organizational Considerations
4) Staffing Considerations
5) Programmatic Considerations
6) Technology and Systems
7) Marketing and Enrollment Management
8) Program Management, New Program Development, Design, and Instruction
9) Retention and Student Services

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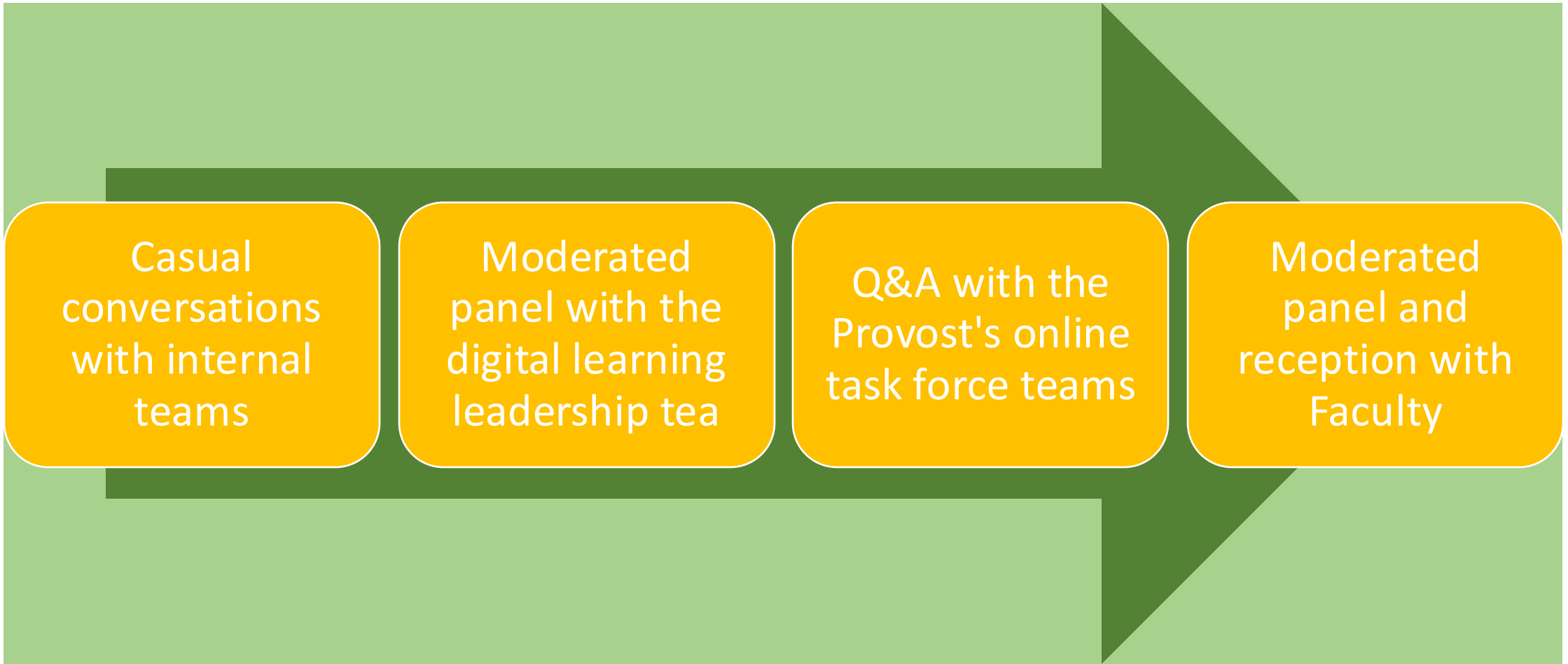
UPCEA Expert Speaking Engagements

Objective: A large, R1 University has a plan to significantly grow their online undergraduate programs and enrollments. A panel of three UPCEA experts were engaged for a full-day of events to support this effort.



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Second Opinion

- Your UPCEA membership entitles you to a complimentary “Second Opinion”, a free, 30-minute consultation
- Our lead consultants are available to help address your specific challenges.

Member Perspectives

- Ross Jahnke, Ed.D.
- Director of Professional Development Programs
- University of Minnesota

Member Perspectives

- Balvinder Kumar
- Associate Vice President, University Extension (Interim)
- California State University East Bay