What we do.

Advancing higher education through insight and innovation
We are passionate about education. We are a group of talented, authentic people from around the world, and we’re pursuing this passion together. We share a belief that every one of our clients deserves 100 percent of our commitment. That may be why you’ll often hear us referring to clients as our partners and friends. We measure success not by the number of clients served or the growth of our own business, but instead by just one factor — client success.

We constantly strive to provide clients with something they may not be able to find elsewhere — that rare, powerful blend of evidence, expertise, and experience. We believe that thoughtful insights don’t always come in the form of a 50-page report. Instead, true insight is derived through a unique combination of highly focused research designed to address specific challenges, sophisticated data analysis, evidence-based findings, deep understanding of the rapidly changing marketplace, and recommendations based on wisdom and creativity — all delivered in a dynamic, personal manner that encourages feedback, discussion, and change.

We do business this way because we love it and because it works. We are dedicated to our mission to deliver the best service and client outcomes possible. Your outcomes! We understand that our work is not about us. It’s about you, and we wouldn’t have it any other way.

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## Tackle the Big Questions

*Decision analysis and facilitation*

You may be considering some new and perhaps unprecedented strategic decisions for your institution.

These may include choices about whether, how, and when to engage in distance learning, develop a global strategy, expand with new programs or locations, dramatically reduce the cost of attendance, or develop strategic partnerships with other institutions. We have collaborated with boards of trustees, presidents, and executive cabinets over many years to help address these and other complex issues.

First, we will help you test and clarify your objectives and reach some level of shared understanding among your key players. Next, we will use primary and secondary research to identify trends, conditions, and internal capacity and gather the critical evidence you need to make good decisions. Finally, we will facilitate a focused set of conversations designed to prioritize options, create multiple approaches to capitalize on an opportunity or counter a problem, weigh the costs, benefits, and trade-offs of each choice, and build the essential implementation plan.

### Helping you consider the major choices ahead

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<th>Question</th>
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<tr>
<td><strong>1</strong></td>
<td>How do we consider whether or not to engage in distance learning or expand or adjust our current online offerings?</td>
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<td><strong>2</strong></td>
<td>What are the right sources of knowledge and expertise to inform a careful internationalization effort?</td>
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<td><strong>3</strong></td>
<td>What steps should we take to weigh the costs and benefits of a substantial reduction in our cost of attendance?</td>
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<td><strong>4</strong></td>
<td>Are there productive opportunities for us to expand into new areas of study or different locations?</td>
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<td><strong>5</strong></td>
<td>How do we decide which strategic partnerships will best extend our reach, bolster our finances, or build our brand?</td>
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For many decades we have been using our expertise, experience, and evidence-based orientation to help college and university leaders consider and resolve the big questions. We bring wisdom and complete trustworthiness in all we do. Think of it as analytically driven decision support achieved through some or all of these services:

- Executive coaching
- Team facilitation
- Qualitative research
- Survey research
- Secondary research
- Market assessments
- Enrollment consulting
- Pricing optimization
Your institution relies on the contributions of each incoming class from the moment the students enroll and for decades after they graduate.

Are you building relationships and implementing enrollment strategies today that realize the value of students at their initial point of inquiry, through matriculation and graduation, and well into their years as loyal alumni?

The long-term implications of any one class underscore the importance of understanding and adapting to students as they progress and change throughout the entire enrollment lifecycle — from prospects to inquiries, applicants to admits, and enrollees to alumni. Knowing where to begin in the practice of effective enrollment management can be overwhelming. We can help you synchronize and centralize your existing efforts and map out a comprehensive plan that develops goals and steps to achieve those goals in order for your institution to find enrollment success today, next year, and many decades from now.

### Creating value throughout the enrollment lifecycle

| 1 | Are you using strategic financial aid modeling to maximize the use and value of your institutional grant aid? |
| 2 | Do you understand the perceptions held by prospective students and parents of your institution’s price, quality, and value? |
| 3 | Do you optimize recruitment by focusing on the prospect, inquiry, and application stages? |
| 4 | Do you understand the market demand for current and proposed programs? |
| 5 | Are you effectively strengthening satisfaction to improve the retention of current students, faculty, and staff? |
We’ve helped many colleges and universities develop and achieve their enrollment management goals by using a highly customized and personalized approach throughout all of our service offerings, including:

- Enrollment consulting
- Strategic financial aid modeling
- Student recruitment optimization
- Yield enhancement studies
- Strategic planning
- Alumni engagement research
- Market research
- Student retention and satisfaction studies
- Branding, marketing, and communications
- Pricing optimization
Your institution’s brand ranks among your most valuable assets. It’s also among the least well understood.

Your brand reflects both the promises you make to the market and whether and how you actually deliver on those promises. In this sense, the brand combines your external and internal marketing and communications efforts with the perceptions your stakeholders — prospective and current students, parents, alumni, faculty and staff, employers, and opinion leaders — have about their experience with your institution.

We’ll help you understand your stakeholders’ thoughts and feelings and, more important, the behavioral and attitudinal drivers of their decision to enroll, to stay through graduation, to donate, or to hire your graduates. We’ll help you translate this research into compelling strategy, positioning, messaging, planning, and writing.

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<th>Understanding and building your institution’s brand</th>
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<td>1. Are you engaging key stakeholders at the right times and with the right messages and media?</td>
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<td>2. Do you have a messaging system, does it appeal both cognitively and emotionally, and are you using it consistently across the institution?</td>
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<td>3. Do you know what your key stakeholders think and feel about you and which messages drive their behaviors?</td>
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<td>4. Have you assessed the quality of your messages, media, and materials and those of key competitors?</td>
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<td>5. Are you aligning external image with internal identity efforts and coupling brand promises with actual brand performance?</td>
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We’ve helped many colleges and universities answer these questions through the skillful, creative application of these brand-building services:

• Institutional, enrollment, and advancement marketing and communications advising
• Market research and multivariate statistical analysis
• Brand positioning and messaging development, testing, and training
• Multiyear marketing and communications planning (strategy, metrics)
• Competitive marketing and communications assessments
• Presidential public affairs and thought leadership campaigns
We appreciate the importance to the health and vitality of your institution of building and sustaining strong, long-term relationships with and among your alumni.

Loyal and engaged alumni play a vital role in the present and future life of your campus. They can build positive awareness, support admissions efforts, create internship and job opportunities, forge bonds with other alumni, serve as volunteer leaders, and give to annual and capital campaigns. Every day of every year, they represent your institution in all parts of the world.

Whether looking to increase fundraising or friendraising, we can help you build and strengthen the relationships your institution has with its alumni community.

1. Does your suite of alumni services add real value to the lives of your alumni?

2. Is your alumni brand in alignment with the institution’s brand?

3. Do you know the most effective ways to engage alumni of every age?

4. Do you need to reinvigorate the programs, benefits, and communications that target your institution’s alumni?

5. Do you need to build higher levels of engagement in advance of a future fundraising campaign?
We’ve helped dozens of colleges and universities — urban and rural, public and independent, big and small, secular and religious — understand their alumni better through qualitative and quantitative research. Our experienced team of practitioners and researchers can tailor a plan to fit your current needs, including services such as:

- Alumni communications assessments
- Alumni focus groups
- Alumni survey research
- Data modeling
- Brand renewal
- Organizational assessments

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Higher education is a continuously and rapidly evolving market. Are you able to keep pace?

Trying to grasp the latest trends at your own institution can be challenging enough, not to mention the overwhelming task of measuring the pulse of the market as a whole. Your institution’s ability to discern the direction and rate of change is critical for making the best decisions about institutional strategy. You need sound feedback about the current and future state of your particular markets. You need to know what matters, and you need to know why.

We’ll work with you to develop a set of questions that will get right to the heart of your toughest challenges and your deepest inquiries. We can help, whether it’s understanding how students and their families choose a college in today’s dynamic environment, learning more about what makes students successful, determining how best to connect with alumni, or something that is entirely unique to your institution.

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<th>Insightful research drives sound institutional strategy</th>
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<td>1. Do you offer an academic program portfolio that speaks to the market?</td>
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<td>2. What are your institution’s brand strengths and weaknesses?</td>
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<td>3. What do your admission staff and faculty need to know to be effective recruiters?</td>
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<td>4. What is the right price for your institution, and what are the implications of making a tuition change?</td>
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<td>5. How can you develop successful recruiting strategies to shape your class?</td>
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We’ve helped over 400 colleges and universities across the country answer these questions by applying a unique combination of practical experience and deep analytical know-how. Our market research services cover the following areas:

- Brand perceptions, positioning, and competitive assessment
- Communications preferences and message testing
- Pricing research
- Application and enrollment drivers across the admissions funnel
- Identification and exploration of new markets
- Market characteristics for academic programs
- Student success: retention, completion, and satisfaction
- Alumni engagement and giving

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Attract top scholars, artists, and athletes. Promote diversity. Fill your residence halls. Maximize revenue.

You want to enroll students who will be proud and generous alumni for the rest of their lives. Is your college or university getting that kind of return on the millions of scholarship dollars invested in students?

Are your scholarship dollars taking your institution to the next level? If you think your financial aid program could be more effective than it is, let us show you how.

We’ll help you understand how your scholarship program drives students to your institution (or not). Working together, we will articulate the goals for your next freshman class and create an effective awarding strategy to attract the students you most want to enroll.

Do you offer scholarship awards or scholarship rewards?

1. Do you suspect that you are spending too much in scholarship aid — or too little?

2. Is your institution using a scholarship awarding strategy created more than five years ago?

3. Are the numbers of calls for “financial aid reconsiderations” increasing each year?

4. Is your scholarship strategy calibrated to yield the students you want most?

5. Are the yields on your top scholarship programs decreasing?

6. Do you need an expert eye to review your current scholarship strategy?

7. Are your scholarship dollars being put to their best use?
We’ve worked with many colleges and universities to help them achieve their enrollment goals through the application of our financial aid modeling services. We help our clients:

- Increase enrollment
- Boost net revenue
- Decrease discount rate
- Promote campus diversity
- Drive student quality
- Improve market competitiveness

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A change in your institution’s sticker price is more than just a change in price.

Whether you suspect that your institution’s current price is scaring away prospective students or fear even more that the proposed annual tuition increase will, we can help you navigate this important strategic decision.

Each year, families have to pay more for college, and each year you worry about the effects on first-generation students. Diverse students. International students. The kid next door. We are worried about this, too. That’s why we partner with our clients to target not just a price, but the right price. Often, the right price makes the difference between meeting an enrollment goal and missing a class.

We’ll help you understand how your institution’s “sticker price” and “net cost” drive students to you (or to the competition). We will identify how prospects perceive the relative value of an education at your institution and therefore, how much they are willing to pay. Armed with that evidence, you can make difficult pricing decisions with confidence.

1. Are you concerned that this year’s proposed tuition increase is too steep?

2. Do you suspect that your college or university is overpriced? Underpriced?

3. Are you curious about what would happen to enrollment if your institution significantly increased or decreased its price?

4. Do you worry that your institution’s price is negatively affecting enrollment and/or retention?

5. Does your institution increase its price each year and hope for the best?

6. Are you under pressure from students and/or trustees to lower your institution’s price?
Using our econometric modeling and highly customized, cutting-edge market research, we’ve helped many colleges and universities set the right price. We will work with you to:

- Anticipate enrollment outcomes
- Test different pricing scenarios
- Determine price sensitivity
- Understand the competition
- Identify your institution’s value
- Find out how much is “too much”
- Avoid costly mistakes

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Instead of trying to prepare for some future that is “out there,” actively create the future that you desire.

Whether your institution’s need for strategic planning is prompted by a compelling issue such as declining enrollment, driven by a major institutional transition such as the installation of a new president, or occasioned by an externally prompted obligation such as an accreditation review, we can work with you to design and facilitate a strategic planning process that helps you achieve your institutional vision.

Over the years, we’ve developed a nationally recognized approach to strategic planning and a set of supporting tools, exercises, and techniques that have proven successful in a broad array of college and university settings.

Wrestling a vision of the future into the realm of reality

1. Are your key constituencies aligned around a shared institutional vision?

2. Is your institutional mission merely a statement of noble platitudes rather than a distinctive expression of touchstone values that shape strategic decision making?

3. Do you have achievable goals and action plans that are continually refreshed by a strategic perspective?

4. Are you concerned that a lengthy strategic planning process might only produce a voluminous but rarely consulted document?

5. Is your institution self-sufficient in terms of strategic thinking and planning at all levels of the institution?
We’ve partnered with many colleges and universities to address their strategic planning questions and concerns through a highly collaborative process that:

• Responds to an institutional vision rooted in mission, inspiring, and mobilizing all stakeholders and marshaling their best efforts
• Builds upon your institution’s collective knowledge and a shared strategic database
• Uses key strategic performance metrics displayed in compelling dashboard formats
• Is timely and cost effective, engaging only as many research and consulting services as are needed and only for as long as needed to achieve your goals
That’s what we do.