Mergers and Consolidations: Impact on IPEDS Reporting

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Reasons for Merging

To cut costs

Adjust to changing demographics

Align institutional missions

To increase program offerings

Save campuses that are in trouble

To pursue students in other markets (online, foreign, working parents)

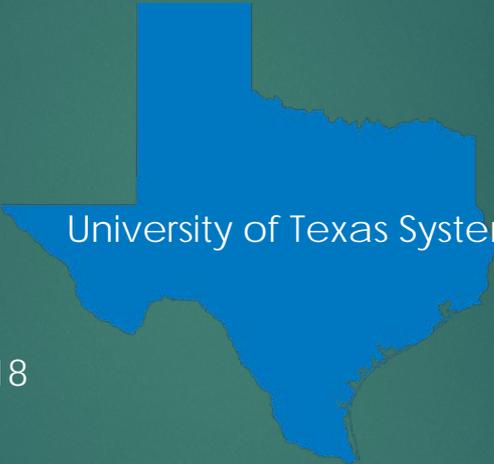Spreading out costs and reducing overhead

State College System Mergers

Kentucky Community &
Technical College System 1997,
2004

University of Wisconsin System
2018

University of Texas System 2012

University System of Georgia 2013-2018
Technical College System of Georgia
2011-2015

Louisiana Community &
Technical College System 2012

Minnesota State Colleges and
Universities 1991, 2021

What happens during a merger?

Relative timeline of a merger of HEIs

Phase 1:
Exploration and Consideration

Phase 2:
Premerger

Phase 3:
Merger

Phase 4:
Early Postmerger

Phase 5:
Late Postmerger

A few months to a few years

~ 1 to 2 years

~ 1 year

~ 1 to 2 years (more if needed)

~ 10 years

Source: Strategic Mergers in Higher Education, 2019

Guide2Research

CASE STUDY– GA College Merger

▶2013, Georgia Health Sciences University and Augusta State University consolidated into Georgia Regents University, now known as [Augusta University](). The union aimed to create a student-centered research university as well as an academic health center. It also offers a wide range of academic programs and services, from learning assistance to postdoctoral studies. During its consolidation processes, the new university identified opportunities and benefits early on. Some of the most notable ones are:

▶**Significant reduction of costs in administrative processes** – In its first week, Augusta University reduced administration costs by as much as 3% compared to the previous year.

▶**Better talent recruitment** – The resulting larger institution recruited nationally recognized talents, faculty members, and leaders with specific expertise and specializations.

▶**Efficiency and savings** – It eliminated duplicate programs, used facilities more efficiently, and saved on supplies through large, bulk orders.

▶**Greater academic value** – Old programs were revamped, and new ones were created through the combination of resources and talents. The consolidation also provided more opportunities for faculty development.

▶**Better reach and footprint** – The larger university was able to use the 700 training sites from the former Georgia Health Sciences for non-health-science courses. Additionally, these training centers are utilized in the recruitment of new undergraduate students across the state.

▶**Increased competitiveness** – By combining the previously-mentioned benefits with the larger student body, the university is more competitive, especially in supporting existing and new projects such as the athletics program. The larger student population also provided a relatively stable revenue stream. Furthermore, any increase in tuition fees due to declining state support can be distributed across a larger student body.

CASE STUDY - University System of Georgia
Principles for Assessing Consolidations

Increase opportunities to raise education attainment levels. Enhancing opportunities for students to raise their education attainment levels will be a goal.

Improve accessibility, regional identity, and compatibility. Geographic proximity, transportation corridors, student backgrounds, ensuring as much as possible a cultural fit, and other factors which strengthen the qualitative aspects of campus offerings will be considered.

Avoid duplication of academic programs while optimizing access to instruction. Consideration will be given to demand for degrees, program overlaps and duplications, and optimal institutional enrollment characteristics sufficient to offer and support the needed array of services.

Create significant potential for economies of scale and scope. Consideration will be given to the potential for achieving cost efficiency in service delivery, degree offerings, and enrollment.

Enhance regional economic development. Consideration will be given to consolidations with the potential to improve economic development through enhanced degree programs, community partnerships, and improved student completion.

Streamline administrative services while maintaining or improving service level and quality. Potential for administrative efficiencies and savings which yield more effective service will be considered. In addition, functional consolidations on a regional basis will be analyzed.

Augusta & GHSU Profiles

Augusta State University

- Established 1925
- Fall 2011 Enrollment: 6,741
- 67.5% enrollment from Columbia and Richmond
- First-Year Retention: 68.5%
- Six-Year Graduation: 24.5%
- FY11 Degrees Conferred: 1,097
- Total FY12 Budget: $69.6M

Georgia Health Sciences University

- Established 1828
- Fall 2011 Enrollment: 2,948
- 16.5% enrollment from Columbia and Richmond
- First-Year Retention: N/A
- Six-Year Graduation: N/A
- FY11 Degrees Conferred: 840
- Total FY12 Budget: $632.4M

CASE STUDY-Merger Challenges

- Significant differences in institutional mission, organization and governance.
- Risk of marginalizing the smaller community being absorbed by the larger institution.
- Little to no change within the dominant partner's faculty and staff resulted in the loss of opportunities for reevaluation and improvement.
- Branding and identity issues may affect the recruitment of new students.
- Risk of creating more complex processes which can lead to inefficiency and higher expenditure.
- Fewer opportunities to eliminate duplications as Augusta State University and Georgia Health Sciences University are dissimilar from each other. The former was oriented towards liberal arts, and the latter was focused on health and biomedical sciences.

Possible Questions for Merging Institutions

1. If there is a merger between two institutions, do both campuses remain open or does one close in order to reduce operating and capital expenses?
    a. If one college is to close, how do those responsible make the decision about which one closes?
    b. What weight should they give to such factors as the comparative amount of deferred maintenance, which campus has the more desirable location in terms of admissions and whether one campus has a greater likelihood of being sold to another entity in order to have additional funds to support the new merged institution?
2. If two campuses with low enrollments merge and one campus is closed, what reason is there to believe that students who were interested in the now-defunct campus would enroll at the new merged institution, in a different location?
3. If a campus closes, what happens to its endowment, particularly restricted gifts
4. If a campus closes, how will the students from that campus be accommodated?
5. Assuming that the merger is intended to create economies of scale, who decides which faculty and staff members will be retained and who will be let go?
6. Who decides and on what basis which programs will continue and which will be closed?
7. What degree will graduates be given going forward? Will alumni be given the opportunity to change their degree-granting institution to the new entity?
8. What name should a merged entity carry?

Reporting Challenges

Enrollment

What happens when the merger takes place in the middle of the academic year? (12 month enrollment)

Cohorts

Do I combine cohorts from both schools for SFA, GRS, GRS200, and OMS?

Finance

Do I combine the two institution's GPFS?
Do I have audited financial statements for both institutions?
What happens with a mid-year merger?

X

Merged institutions will have multiple fatal errors. This does not mean your data are incorrect, it means you must speak to the help desk.

- Cohorts won't match previously reported numbers for multiple surveys.

- Finance numbers will often be much higher for merged institutions. Beginning and ending values of endowment assets may trigger fatal errors.

Using the Data Challenges

▶ Trying to pull historical data (what happened to the previous college? I can't pull it up in IPEDS Use the Data.

▶ How do I know the college merged?

▶ When pulling data for state systems that merged, it looks as if they have added more colleges instead of consolidating into fewer colleges. Why?

unitid	institution name	year	Adjusted Cohort	unitid	Institution name	year	Adjusted Cohort	unitid	institution name	year	Adjusted Cohort
138558	Abraham Baldwin Agricultural Col	2009	813	138558	Abraham Baldwin Agricultural (	2013	1240	138558	Abraham Baldwin Agricultural Co	2015	1047
138682	Albany Technical College	2009	247	138682	Albany Technical College	2013	553	138682	Albany Technical College	2015	379
138716	Albany State University	2009	537	138716	Albany State University	2013	626	138716	Albany State University	2015	745
138840	Atlanta Technical College	2009	329	138840	Atlanta Technical College	2013	488	138840	Atlanta Technical College	2015	403
138901	Atlanta Metropolitan State Colleg	2009	226	138901	Atlanta Metropolitan State Col	2013	264	138901	Atlanta Metropolitan State Colleg	2015	418
138956	Augusta Technical College	2009	542	138956	Augusta Technical College	2013	626	138956	Augusta Technical College	2015	321
139250	College of Coastal Georgia	2009	379	139250	College of Coastal Georgia	2013	403	139250	College of Coastal Georgia	2015	568
139278	West Georgia Technical College	2009	459	139278	West Georgia Technical College	2013	911	139278	West Georgia Technical College	2015	502
139311	Clayton State University	2009	534	139311	Clayton State University	2013	483	139311	Clayton State University	2015	373
139357	Columbus Technical College	2009	293	139357	Columbus Technical College	2013	467	139357	Columbus Technical College	2015	347
139366	Columbus State University	2009	1037	139366	Columbus State University	2013	996	139366	Columbus State University	2015	1231
139384	Georgia Northwestern Technical (	2009	527	139384	Georgia Northwestern Technic	2013	849	139384	Georgia Northwestern Technical (	2015	495
139463	Dalton State College	2009	599	139463	Dalton State College	2013	768	139463	Dalton State College	2015	1157
139621	East Georgia State College	2009	604	139621	East Georgia State College	2013	725	139621	East Georgia State College	2015	990
139700	Georgia Highlands College	2009	924	139700	Georgia Highlands College	2013	1125	139700	Georgia Highlands College	2015	1124
139719	Fort Valley State University	2009	496	139719	Fort Valley State University	2013	716	139719	Fort Valley State University	2015	984
139755	Georgia Institute of Technology-N	2009	2224	139755	Georgia Institute of Technology	2013	2622	139755	Georgia Institute of Technology-N	2015	2654
139764	Georgia Southwestern State Univ	2009	326	139764	Georgia Southwestern State Ur	2013	388	139764	Georgia Southwestern State Univ	2015	435
139861	Georgia College & State Universit	2009	1027	139861	Georgia College & State Univer	2013	1197	139861	Georgia College & State Universit	2015	1206
139931	Georgia Southern University	2009	2735	139931	Georgia Southern University	2013	3028	139931	Georgia Southern University	2015	3490
139940	Georgia State University	2009	1920	139940	Georgia State University	2013	2521	139940	Georgia State University	2015	2937
139959	University of Georgia	2009	5157	139959	University of Georgia	2013	4675	139959	University of Georgia	2015	4675
139968	Gordon State College	2009	1060	139968	Gordon State College	2013	1048	139968	Gordon State College	2015	1497
139986	Southern Crescent Technical Colle	2009	331	139986	Southern Crescent Technical C	2013	719	139986	Southern Crescent Technical Colle	2015	446
140012	Gwinnett Technical College	2009	365	140012	Gwinnett Technical College	2013	554	140012	Gwinnett Technical College	2015	391
140243	Lanier Technical College	2009	321	140243	Lanier Technical College	2013	424	140243	Lanier Technical College	2015	195
140331	Chattahoochee Technical College	2009	923	140331	Chattahoochee Technical Colle	2013	1520	140331	Chattahoochee Technical College	2015	1136
140678	North Georgia Technical College	2009	386	140678	North Georgia Technical Colleg	2013	562	140678	North Georgia Technical College	2015	344
140942	Savannah Technical College	2009	475	140942	Savannah Technical College	2013	551	140942	Savannah Technical College	2015	384
140960	Savannah State University	2009	607	140960	Savannah State University	2013	612	140960	Savannah State University	2015	866
141006	South Georgia Technical College	2009	270	141006	South Georgia Technical Colleg	2013	530	141006	South Georgia Technical College	2015	280
141255	Wiregrass Georgia Technical Colle	2009	235	141255	Wiregrass Georgia Technical Co	2013	613	141255	Wiregrass Georgia Technical Colle	2015	335
141264	Valdosta State University	2009	1756	141264	Valdosta State University	2013	2029	141264	Valdosta State University	2015	2416
141334	University of West Georgia	2009	1738	141334	University of West Georgia	2013	1803	141334	University of West Georgia	2015	1911
244437	Georgia State University-Perimet	2009	2572	244437	Georgia State University-Perim	2013	3072	244437	Georgia State University-Perimet	2015	2350
244446	Georgia Piedmont Technical Colle	2009	341	244446	Georgia Piedmont Technical Co	2013	385	244446	Georgia Piedmont Technical Colle	2015	228
246813	Athens Technical College	2009	300	246813	Athens Technical College	2013	445	246813	Athens Technical College	2015	323
366465	Ogeechee Technical College	2009	224	366465	Ogeechee Technical College	2013	373	366465	Ogeechee Technical College	2015	139
368911	Southeastern Technical College	2009	173	368911	Southeastern Technical College	2013	196	368911	Southeastern Technical College	2015	88
420431	Oconee Fall Line Technical College	2009	100	420431	Oconee Fall Line Technical Coll	2013	284	420431	Oconee Fall Line Technical Coll	2015	79
				447689	Georgia Gwinnett College	2013	295	447689	Georgia Gwinnett College	2015	708
				482149	Augusta University	2013	896	482149	Augusta University	2015	1009
				482158	Middle Georgia State Universit	2013	1913	482158	Middle Georgia State University	2015	2002
				482680	University of North Georgia	2013	2715	482680	University of North Georgia	2015	3068
				482699	South Georgia State College	2013	795	482699	South Georgia State College	2015	1010
				483045	Central Georgia Technical Colle	2013	2067	483045	Central Georgia Technical College	2015	770
								485111	Georgia Military College	2015	1552
								485458	Coastal Pines Technical College	2015	168
								486840	Kennesaw State University	2015	3243
								487162	Southern Regional Technical Coll	2015	227

Donyell Francis

MERGERS IN GEORGIA

2 Year System Mergers

▶ **Went from 38 Colleges (34 Technical Colleges and 4 College Tech Divisions) to now 22 Technical Colleges**

School A + School B = School A

School A + School B = School C

4 Year & Above System Mergers

▶ **Went from 35 Institutions to now 26 institutions**

School A + School B = School A

School A + School B = School C

School A + School B = School A (with B having a different UnitID)

Possible Issue to Consider from Mergers

▶ Data collection issue from trying to combine two different ERPs.

▶ Academic History / Cum Data of students from school B

▶ Type of students may differ from School A & B

▶ Internal business practices may differ between schools

▶ Approvals with accreditation agencies

▶ Community perspective of merger

Ramya Thiagarajan

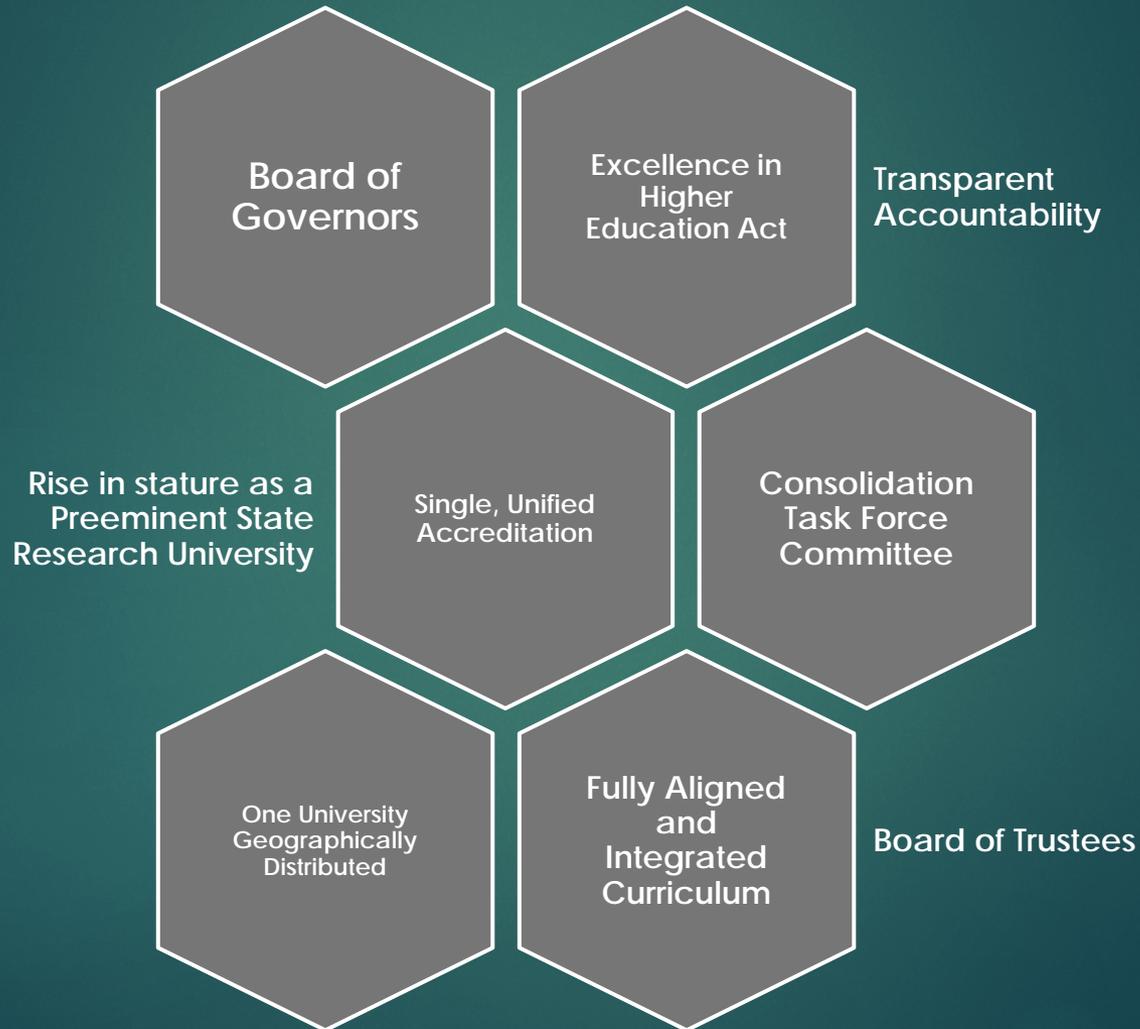Independent Higher Education Consultant
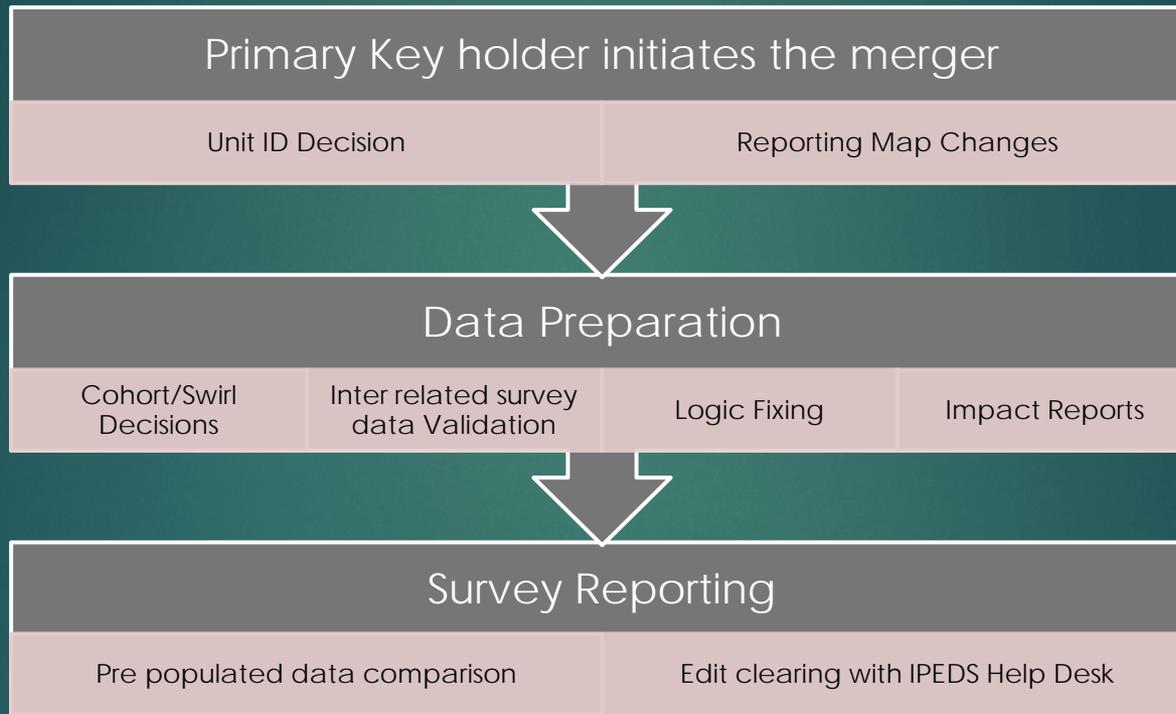
Consolidation of IPEDS Unit ID

Presenter : To talk about her recent experience in consolidating IPEDS reporting for the University of South Florida Tampa, St. Petersburg and Sarasota-Manatee campuses into One USF effective July 1st,2020.

Ramya Thiagarajan
Higher Education Consultant

Authority/ Reasons

Board of Governors

Excellence in Higher Education Act

Transparent Accountability

Rise in stature as a Preeminent State Research University

Single, Unified Accreditation

Consolidation Task Force Committee

One University Geographically Distributed

Fully Aligned and Integrated Curriculum

Board of Trustees

Process for IPEDS Unit ID Merger

Primary Key holder initiates the merger

| Unit ID Decision | Reporting Map Changes |

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Data Preparation

| Cohort/Swirl Decisions | Inter related survey data Validation | Logic Fixing | Impact Reports |

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Survey Reporting

| Pre populated data comparison | Edit clearing with IPEDS Help Desk |

Common Issues/Lessons Learned

- Heavy Lifting – Orchestrated at the campus level by data coordinators during the data preparation step.

- Start Early – Massive coordination required for inter related survey data submission by different units.

- Logic Fixing - Tussle with the reporting methodology and IPEDS FAQ's for efficiently unifying data metrics.

- Impact Reports – Creating analysis reports helps with data validation and QA

- Automation – IPEDS Import specifications is useful for qualitative data upload testing.

- Project Documentation/Issue Log – Helpful for audit trail and record keeping.
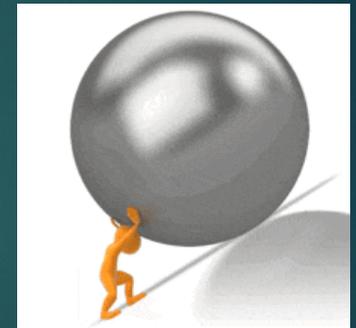
IPEDS Help Desk/Overrides

(877) 225-2568 | ipedshelp@rti.org

Types of Edits

- Tuition and fees adjustments in IC

- Increased headcount in 12M, FE

- Cohort adjustments in GRS, GRS200 and OM as well as Retention from FE

- CIP Code mergers in completions

- Endowments are compared to prior year main/Unit ID data

- Group 1 and 2 (SFA) compared with prior year Student HC (FE)

Explanations/ Overrides

- Differences explained if unit ID is not the same as prior year

- Triggers "Outside the expected range" error

- Fatal edit overridden by IPEDS administrator with updated data emailed to IPEDS support desk

- Triggers prior data not reported which is an explanation edit

- Campus consolidation is explained as the reason to override

- Fatal edit overridden with the help of an IPEDS Administrator