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Dodging the Competency Trap? How Admissions and Financial Aid Offices Adapted to Test-Optional Policies After COVID-19

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ABSTRACT

Standardized admissions testing has long been a key element of the college admissions process for many postsecondary institutions. However, the COVID-19 pandemic forced institutions to quickly adopt test-optional admissions or merit aid policies due to the limited availability of standardized testing. Using qualitative data from focus groups and interviews with 57 chief enrollment officers, we explore the test-optional implementation strategies used by postsecondary admission offices during the pandemic, which included: using alternative measures of academic achievement; leaning into holistic admissions processes with contextualization tools; and implementing dual systems of evaluation for students with and without test scores. While most offices were largely stuck in competency traps, relying on traditional decision-making practices rather than seeking out new ones, others created new evaluative practices or utilized existing evaluation tools in new ways to significantly change their admissions processes. Examining test-optional policy implementation may help explain why these policies, often meant to improve racial and socioeconomic diversity, have yielded only modest benefits.

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Standardized tests have long played an integral role in college admissions and financial aid decision making in the United States. Although admissions testing requirements remained prevalent throughout the twentieth century, scholars have raised significant concerns in the past several decades about racial, gender, and socioeconomic disparities in standardized test scores and have expressed doubts regarding their additive value beyond high school grades in predicting students' college performance (Belasco et al., 2015; Lucido, 2018; Saboe & Terrizzi, 2019). These concerns, among others, have contributed to the ongoing debate as to whether colleges and universities should reevaluate their use of standardized test scores in their admissions and financial aid processes.

In response to the disruptions caused by the COVID-19 pandemic in 2020, including the widespread closure of testing centers, most higher education

institutions made rapid changes to their admissions testing policies. With over one million canceled SAT tests and innumerable issues with ACT cancellations over the course of the spring and fall of 2020, serious concerns emerged about the continued use of these tests for admissions decisions (Jaschik, 2020). Faced with these concerns, leaders in higher education swiftly implemented test-optional or test-free policies for fall 2021 admission (Schultz & Backstrom, 2021). As a result, many institutions that traditionally relied on standardized tests to evaluate students for admission and merit-based aid had to quickly adopt new evaluative practices. This rapid acceleration of the test-optional movement has created a unique opportunity to examine strategies for implementing test-optional and test-free policies, including how admission and financial aid decisions are made, and to explore the consequences of these strategies.

In the years immediately following the COVID-19 outbreak, a majority of institutions continued to experiment with test-optional and test-free policies, although many did not commit to a permanent shift. Given the uncertain future of these policies, we sought to understand how high-level enrollment leaders who oversee admissions and financial aid processes made decisions in the absence of standardized testing, and their perceptions of the challenges and benefits associated with implementing test-optional policies. We focused on enrollment managers due to their ability to provide a comprehensive perspective on how admissions policies and practices were changed in light of broader institutional enrollment priorities. Our study explores the following questions:

- (1) What challenges and opportunities did enrollment managers face in transitioning to test-optional policies?
- (2) How did admissions and financial aid personnel evaluate applicants in the absence of standardized test scores?
- (3) What were the perceived benefits of adopting test-optional policies?

We found that institutions shifting to test-optional policies faced numerous logistical challenges and struggled to find academic measures comparable to test scores, especially in light of instructional changes that secondary schools implemented during the pandemic. As they adapted, institutions took three different approaches to implementing test-optional policies, sometimes exploring new strategies for decision making but often relying on systems and processes that were already in place. Some institutions created dual systems of evaluation, while others invented new quantitative indexes to replace test scores, which were considered virtually irreplaceable in their process. Our findings demonstrate that many admissions offices were stuck in competency traps, seeking marginal improvements in the face of new testing policies without considering more transformative approaches to their work. Examining test-optional policy implementation may also help explain

the puzzle of why these policies, which often seek to improve racial and socioeconomic diversity on campus, have yielded only modest benefits.

Literature review

Since World War II, standardized testing has been widely used in college admissions as a screening mechanism to identify students who were predicted to succeed in college (Lemann, 1999). Despite its ubiquitous role in college admission and financial aid decisions, the use of standardized tests in admissions has been questioned due to well-documented disparities across racial and socioeconomic groups and the lack of predictive power as compared to high school grades (Bastedo & Jaquette, 2011; K. O. Rosinger et al., 2021). These concerns facilitated a test-optional movement among a growing number of institutions in the latter half of the twentieth century. Adopted first at Bowdoin College in 1969, test-optional policies were initially predominant within the realm of private institutions, particularly among smaller, highly selective liberal arts colleges like Bowdoin, Bates, and Holy Cross (Furuta, 2017). These early adopters had predominantly white and wealthier student bodies, differing significantly in their characteristics, missions, and student profiles from other postsecondary institutions (Sweitzer et al., 2018), and test-optional policies were designed to attract larger, more diverse applicant pools (Belasco et al., 2015; Hiss & Franks, 2014). Over time, the test-optional movement expanded to other sectors, and then spread rapidly in 2020 in response to the fallout of the COVID-19 pandemic (Schultz & Backstrom, 2021). Many institutions have continued to use test-optional policies beyond the initial pandemic years, with more than 1,900 of the 2,330 accredited four-year colleges and universities in the U.S. remaining test-optional for all or some of their fall 2024 applicants (FairTest, 2023).

While the use of test-optional policies has greatly expanded, the role that these policies play in shaping admission and enrollment outcomes remains unclear. In case studies conducted at small liberal arts colleges, descriptive findings suggested that test-optional policies contribute to geographic, socioeconomic, and racial/ethnic diversity on campus (Hiss & Neupane, 2004). However these institutions have unique characteristics and student profiles, making these results less generalizable to the broader higher education landscape. In contrast, research using national datasets representing a larger variety of institutions and employing more robust causal inference has suggested that test-optional policies result in only modest gains, if any, on campus diversity (Belasco et al., 2015; Bennett, 2022; Sweitzer et al., 2018). Examining test-optional institutions during the pandemic, K. Rosinger et al. (2024) noted substantial variation in the details of specific policies but found that test-optional policies could increase campus diversity, particularly at moderately selective institutions, when they were extended to all applicants

and scholarships. Nonetheless, the mixed evidence on the potential effects of test-optional policies on diversity gains underscores the need for further research in this area.

Furthermore, little is known about how test-optional institutions evaluate candidates with and without test scores, especially in terms of how they evaluate applicants with reduced academic information (Z. Liu & Garg, 2021; Syverson et al., 2018). Increasing reliance on high school grades rather than test scores may be complicated by the wide variance in high school rigor and grading standards across secondary schools, as well as by the lack of distinction in grades among applicants at the most selective colleges where the majority of applicants have very high GPAs (Zwick, 2017). Even when test thresholds are eliminated, admission lotteries with minimum bars for GPA would produce less equitable outcomes (Baker & Bastedo, 2022).

The test-optional debate is part of a broader discussion of holistic review in admissions. While “holistic review” is becoming a commonly espoused admissions practice, definitions of holistic review vary by institution, creating uncertainty about the holistic review process among applicants and families (Bastedo et al., 2018; K. O. Rosinger et al., 2021; Taylor et al., 2024). Institutions varying in sizes, missions, selectivity levels, and revenue sources are likely to employ different holistic admission techniques to shape their incoming student bodies (Taylor & Cantwell, 2019). With the range of definitions of holistic review implemented by postsecondary institutions, little is known about how holistic practices may impact campus diversity and admissions equity. Existing evidence suggests that incorporating contextualized measures of high school performance alongside other data, rather than solely relying on unidimensional and impersonal indicators (i.e., standardized test scores), may expand college access for traditionally underrepresented students (Bastedo & Bowman, 2017; Bastedo et al., 2018, 2023a, 2023b). At the same time, institutions that are under competitive pressure to increase their campus diversity and attract more applicants may adopt strategies in reporting their ethnracial enrollments to create the appearance of being more diverse than they are in reality (Ford & Patterson, 2019; Ford et al., 2022; Holland & Ford, 2021). Additionally, the general lack of transparency into the evaluative processes at test-optional institutions raises questions about admissions equity between students with and without test scores, fueled further by research showing that students who apply without test scores are less likely to be admitted to some institutions, although these students may also differ from applicants with test scores in other important ways (Syverson et al., 2018).

The allocation of financial aid without test scores, specifically merit-based scholarships, also warrants further study. Evidence suggests that many institutions continue to rely on standardized tests to make award decisions, even in a test-optional admission context. In a recent survey, although 94% of respondents represented test-optional or test-free institutions, nearly 40% of

respondents from four-year public institutions and 14% of respondents from four-year private institutions said test scores were required for some scholarships (Maguire Associates, 2021). Many state-funded scholarships, such as Tennessee HOPE, Zell Miller (Georgia), and Bright Futures (Florida), also have ACT/SAT eligibility thresholds (Ribar & Rubenstein, 2021; Zhang et al., 2013), which may complicate institutions' financial aid processes. Such scholarship requirements drove states with large statewide merit programs to reinstate test-mandating policies early on in the pandemic, or in some cases, to maintain testing requirements even in 2020 (Hoover, 2021).

The lack of information about the implementation of test-optional policies inspired our current research. Few studies delve into the qualitative aspects of test-optional policy implementation. Case and Monday (2024) recently used interviews with admissions staff along with state and institutional documents to examine the perceived benefits and challenges of these policies at two public, less-selective institutions. We expand the research on this topic by examining how enrollment leaders at selective and broad access institutions made admission and financial aid decisions at a time when standardized tests were either limited or unavailable. We also highlight the perspectives of enrollment leaders regarding how test-optional policies contribute to diversity, equity, and inclusion efforts. In doing so, our study contributes to the literature by illuminating the challenges and perceived benefits of enacting test-optional policies and provides insight into the decision-making processes that institutions engaged to adapt to an influential policy change.

Conceptual framework

Our understanding of how enrollment managers navigated the transition to test-optional policies is informed by March's (1991) conceptualization of organizational learning, which we frame within the context of competing postsecondary enrollment priorities. The "iron triangle" of institutional priorities for enrollment management encompasses the need to balance institutional access, educational quality, and the costs of higher education (Immerwahr et al., 2008). As institutions increasingly express a commitment to a diverse student body, the importance of providing access to postsecondary education for underrepresented students of color and socioeconomically disadvantaged students has become a more prominent goal for many institutions (Harris, 2022). At the same time, the desire to increase institutional prestige and meet accountability measures in terms of student retention and completion leads many institutions, especially selective ones, to maintain a focus on enrolling high-achieving students with high test scores (Cheslock & Kroc, 2012; Harris, 2022). These priorities must be balanced with the pressure to enroll students who can pay full tuition in order to generate enrollment revenue, a priority that has increased for public universities as government

funding has fluctuated and eroded over time (Cheslock & Kroc, 2012). Institutional financing is also complicated by the distribution of merit aid, which is one way that institutions compete for high-achieving students who would otherwise not receive substantial need-based aid.

Enrollment managers must balance these institutional priorities as they recruit, admit, and work to yield students each year. Using this context as background, we employ March's (1991) conceptualization of organizational learning to understand how admission offices approached evaluating applications after the pandemic shift to test-optional policies. Under March's framework organizations take two approaches to resource allocation during adaptive processes: exploitation of strategies that have been successful in the past and/or exploration of new alternatives. According to March, exploration includes actions and behaviors such as search, risk-taking, experimentation, and innovation, while exploitation includes activities such as refinement, extension of existing technologies, production, and implementation. Dee and Leišytė (2016) describe the successful combination of these approaches as a balance of understanding external opportunities and capitalizing on insider knowledge of institutional strengths and capacities. Both processes are typically led by top-level managers in an organization (Dee & Leišytė, 2016). In the context of postsecondary institutions, enrollment managers are key decision-makers in developing the policies that shape admissions processes, and thus are likely to guide whether an institution takes an exploratory or exploitative approach to organizational learning in implementing new admissions practices.

While exploration is necessary for long-term organizational growth and development, the short-term results of exploration are uncertain and unpredictable, resulting in a tendency for organizations to rely more heavily on exploitative behaviors that yield immediate and positive results (W. Liu, 2006; March, 1991). Thus, institutions often choose to prioritize the use and further development of existing competencies while reducing the resources allocated to the pursuit of new competencies (Levinthal & March, 1993; March, 1991). This dominance of exploitation over exploration leads to competency traps, i.e., the tendency to continue refining procedures that an organization performs well rather than investing in exploring and learning new procedures (Levitt & March, 1988; March, 1991). Organizations that fall into competency traps seek marginal increases in the performance of successful processes rather than seeking alternative processes that could lead to transformational outcomes. Competency traps curtail innovation and hamper an organization's ability to adapt long-term to its external environment (Ahuja & Tandon, 2018; W. Liu, 2006). In the ever-evolving postsecondary education market, an over-reliance on past success may also leave colleges and universities at a competitive disadvantage. On the other hand, seeking transformative alternatives also increases the level of risk to the organization, and to the survival of

its leaders, and thus is far more likely to occur during periods of high environmental turbulence (W. Liu, 2006; March, 1991).

While March's conceptualization of organizational learning has not been studied in depth in the field of enrollment management, we believe it is directly relevant to understanding the behaviors and perspectives of enrollment managers during the COVID-19 pandemic. In the admissions process for postsecondary institutions, the traditional reliance on standardized test scores to evaluate applicants' academic abilities has created the potential for competency traps, with institutions continuing to use the same processes to admit students and award financial aid without exploring possible alternatives. The onset of the COVID-19 pandemic served as a significant environmental disruption, resulting in the limited availability of standardized testing and forcing many admissions and financial aid offices to rapidly adapt. Ultimately, some institutions responded to this change by creating new tools or processes for making admissions and financial aid decisions (exploration), but many institutions made only incremental changes to their current processes, managing the rapid shift to test-optional policies (exploitation) rather than investing resources in seeking alternatives that could lead to transformational change. We discuss specific strategies in relation to institutions' exploration and exploitation behaviors in the findings.

Methods

This research stems from a two-year, mixed-methods study examining the COVID-19 pandemic's impact on college enrollment and the responses of postsecondary institutions in the United States. To address our research questions, we focus on the qualitative data collected on institutional transitions to test-optional and test-free policies rather than the quantitative data on student-level enrollment changes that was used in the larger study. The qualitative data include focus groups and individual interviews with chief enrollment management officers (CEMOs) representing 57 institutions of higher education (IHEs). CEMOs were recruited based on their participation in professional networks and represented a geographically diverse set of institutions ranging in type and selectivity, including nine Minority-Serving Institutions (MSIs). The research team used targeted recruitment to ensure diversity in the types of institutions and perspectives represented by the data. Grouping participants by institutional sector and selectivity (public less-selective colleges, public selective colleges, private less-selective colleges, and private selective colleges), members of the research team conducted 15 semi-structured focus group interviews in summer 2021 with 57 CEMOs (see [Table 1](#)). Each focus group included between 2 and 5 participants and lasted approximately 90 min. To collect longitudinal data, the research team then conducted individual semi-structured interviews with 31 CEMOs in fall 2021,

Table 1. Focus group participants by institution sector and selectivity.

Type of Institution	Number of focus groups	Number of participants
Public, Less Selective	3	10
Private, Less Selective	4	17
Public, Highly Selective	5	17
Private, Highly Selective	3	13

primarily drawn from participants in the focus groups with a small number of additional participants recruited to further increase geographic and institutional sector diversity. The research team then conducted follow-up interviews with these 31 participants in the spring of 2022 (see [Table 2](#)). Each individual interview lasted approximately 45–60 min. While we cannot provide detailed demographic data of our sample due to strict confidentiality, our participants in both the focus groups and individual interviews were evenly distributed between public and private as well as selective and less selective institutions ([Tables 1 and 2](#)). All focus group and individual interview participants verbally provided their consent to participate in the research at the beginning of each interview and were offered a gift card to incentivize participation.

Interview and focus group conversations were transcribed verbatim. Using Atlas.ti, the larger research team coded data collectively and iteratively to examine how the COVID-19 pandemic impacted college enrollment and enrollment management policies and practices. Using grounded theory techniques ([Charmaz, 2006](#)), interview transcripts were coded into broad themes. The coding process was iterative, where we added codes and developed subcodes to further organize our data into larger themes. We discussed, reconciled, and revised our codes during weekly team meetings. Team members also documented their rationale for creating subcodes in memos, which were reviewed and discussed by the entire research team. Throughout this process, our team noted any recurring themes across our data, including anomalies in our coding. Ultimately, we developed five broad themes, including enrollment trends, recruitment, test-optional admissions, financial aid, and retention, with subcodes for each theme. Since our research questions center on IHEs' transition to test-optional policies in the wake of the pandemic, we then further analyzed the subcodes related to test-optional admissions in terms of selection, financial aid, and diversity, equity, and inclusion. Three members of the research team inductively coded the data under these

Table 2. Individual interview participants by institution sector and selectivity (Fall & Spring).

Type of Institution	Number of participants (fall)	Number of participants (spring)
Public, Less Selective	8	8
Private, Less Selective	7	7
Public, Highly Selective	8	8
Private, Highly Selective	8	8

subcodes to identify themes in institutions' approaches to test-optional admissions, as shared in the findings, as well as challenges and benefits of the move to test-optional policies.

There are several limitations to this research. The research team initially had difficulty identifying enough CEMOs to participate in individual interviews, which may have led to sample bias as institutions that were faring better during the pandemic may have been more likely to have the time and resources to participate in this study. While our sample includes participants across sectors and levels of selectivity, it is impossible for these informants to represent the huge range of institutional experiences during the pandemic given the variability in state policies around higher education and financial aid that may impact institutional policy, especially for public institutions. It is also important to note that our focus on test-optional admissions policies led to the exclusion of data from community colleges for this analysis, as community colleges typically do not require standardized testing for admission into their general education programs. Finally, some institutions from our sample had implemented test-optional policies prior to the start of the pandemic, and several institutions implemented test-free policies in which standardized testing was not considered for any applicant during the admissions process. The former are incorporated into the findings as relevant to shifts in their processes due to the pandemic, while the latter are distinguished as "test-free" institutions when we use direct quotations from enrollment managers at these colleges and universities.

This project was reviewed and approved by the Institutional Review Boards (IRBs) at the University of Southern California and the University of Michigan under approval number HUM00199626.

Findings

Implementing test-optional policies in response to the COVID-19 pandemic required significant changes to existing admissions and financial aid processes. These changes typically fell into one of three approaches: (1) using standardized numeric measures of academic potential beyond or including standardized test scores; (2) engaging other aspects of holistic admissions processes more fully or intentionally; or (3) relying on a dual system for evaluating applicants with and without test scores. While some admission offices explored creative options for evaluating applicants within each of these approaches, many institutions relied on systems or processes that were already well-established, falling into competency traps that limited their ability to transform their admissions processes. Additionally, although some CEMOs perceived these changes to be beneficial in broadening access to their institutions, the shift to test-optional policies during the pandemic also created a myriad of logistical challenges for them and raised concerns about equity.

Challenges of test-optional admissions

The shift to test-optional admission policies created several logistical and implementation challenges for admissions and financial aid offices. For institutions that had previously relied on test scores to compare applicants' academic ability across the board, test-optional admissions forced them to change their evaluation criteria to focus on other aspects of students' academic profiles. CEMOs reported that this change left admissions officers struggling to find comparative measures of academic achievement in vast and diverse applicant pools drawn from thousands of high schools. A CEMO from a selective public institution described:

Taking out an integral piece of objective data . . . made it very difficult. We had to try to figure out what quality means across thousands and thousands and thousands of high schools that don't have similar grading structures or rubrics or courses that are offered, but we had to make sense of that.

Many CEMOs noted that this was particularly a challenge in admission to STEM programs, which previously had relied heavily on the mathematics portion of standardized tests to gauge students' academic preparation. Assessing and comparing applicants' academic credentials was further complicated by the changing grading structures, curriculum, and modes of instruction that secondary schools employed as a result of the pandemic lockdown and the eventual readjustment back to in-person learning. "Elimination of test scores by itself would have been okay to manage," shared the CEMO at a selective public institution. "Elimination of test scores and so many students opting to take pass/no pass or credit/no credit was a bigger challenge for us." A CEMO from another selective public institution concurred, explaining, "there's a difference between a pass and seeing a 'C' or 'D' when you're trying to figure out how well somebody did in calculus."

At some institutions, the high caliber of the applicant pool made it difficult to distinguish between applicants without test scores. "Everybody is in the top of their class," shared a CEMO from a selective public university, "so how do you differentiate students without the scores?" This was especially a concern in terms of institutional processes for awarding merit aid. An enrollment leader at a broad-access private institution shared this sentiment, worrying that grade inflation would go unchecked without standardized test scores:

Tests are helpful, particularly on the higher-end students, to determine the difference between a 22, a 26, and a 30. If you're competing for those higher academic scholarships, fellowships, grants, that's the deal breaker, because when you have a whole set of 4.0 or 4.25 or whatever these outrageous GPAs are these days, that test score is a way to determine the best of the best . . .

As a result of these challenges, CEMOs felt that the application and merit aid review processes often took longer while admissions teams looked for new

ways to determine differences in academic credentials. Representatives from institutions that more fully engaged in holistic review processes also noted that these processes increased the amount of time that admissions teams spent on application review. “In the first year of not having testing, we had to do some of that recalibrating,” shared an enrollment leader from a selective private institution, “and, as a result, as we were looking for different ways to find strength in a student by way of narratives and by other metrics, it took us longer to get through them. Committee took longer.” For some institutions, the evaluation process was also lengthened by a surge in applications in response to their test-optional policy, which made their admissions process more selective. As a CEMO from a selective private institution shared, “we still have a fixed pie to make. We don’t have a larger class because there’s a large applicant pool.”

Enrollment leaders also cited a number of logistical challenges to implementing test-optional policies. For some institutions, the switch to test-optional evaluation required intensive retraining of their staff or increased reliance on and training of seasonal application readers. At one broad-access public institution, an enrollment leader shared that they could offer students admission without test scores, but would then advise admitted students to take a standardized test to receive financial aid. “You can imagine how confusing that is for students,” the CEMO explained.

I really wanted to go more holistic on our merit scholarships and not be rigid to the ACT and SAT, but because of the state requirements and because our [state scholarship] still requires the ACT or SAT, the Executive Council didn’t go for it this year.

For many institutions in Southern states, where political or legislative dynamics required them to maintain test requirements for admissions and/or financial aid, difficulties in establishing new evaluation procedures were replaced by concerns about maintaining existing testing requirements during a pandemic. CEMOs worried that test requirements potentially put students’ health at risk while also disadvantaging their institutions in a test-optional market, particularly with respect to out-of-state applicants.

Several enrollment leaders from selective public institutions expressed concerns that their test-optional admissions policies might inadvertently advantage or disadvantage certain groups of students. One CEMO felt that students from feeder schools would receive more preference in the admissions process, sharing “I probably am not going to take a chance on that kid in [another state]. It’s going to be like, no, I’ll go with what I know, and this [feeder-school] kid looks a little bit better to me.” Another CEMO expressed concerns that high-income students were using test-optional policies as a means to gain access to more selective institutions, sharing “if we see more and more of that behavior, this is not about access — it’s about students finding another way to game the system.” Additionally, for institutions that

used different evaluation systems for students with and without test scores, the process could feel inherently unequal. “How are we treating . . . all applicants equitably?” posited one CEMO. “That’s tough when you’re using two very, very different scales.”

While many enrollment leaders encountered significant challenges in the shift to test-optional admissions policies, some CEMOs noted that going test-optional was not a huge change for them. For example, an enrollment leader at a broad-access public university explained that standardized testing, while required for applicants prior to the pandemic, was never a deciding factor in their admissions process.

I was talking to our admissions people and said, “okay, really, when’s the last time we did not admit a student because of their ACT score?” None could come up with one. We’re an open-access institution. We’ll figure out a way for everyone to get in.

Another CEMO from a broad-access institution implementing a test-free policy shared that removing testing from their evaluation metrics actually simplified their process, as they could admit all students who met a GPA threshold and had taken the appropriate core classes in high school. A number of institutions had been test-optional for admissions but not for merit aid prior to the pandemic. These institutions shared similar challenges in finding new formulas for calculating merit aid but did not have to make any major adjustments to their general admission practices.

Evaluating applicants in a test-optional environment

Institutions took a variety of approaches in adjusting to test-optional admissions and financial aid processes, often exhibiting a combination of exploration and exploitation learning behaviors. These approaches included centering standardized measures of academic achievement beyond test scores; engaging new aspects of holistic admissions processes or relying more heavily on prior holistic processes; and utilizing dual decision-making processes for students with and without standardized test scores. While institutions often explored creative strategies within each of these approaches, many used their resources to recreate familiar processes, ultimately refining but not drastically changing their typical admissions or financial aid processes. In this way, institutions by and large succumbed to the competency trap of relying on strategies that were successful in the past, missing the opportunity for true innovation.

Using standardized measures of academic potential

With limited availability of SAT and ACT scores, many admissions teams became more reliant on other standardized measurements of academic success. In particular, some institutions increased their emphasis on Advanced

Placement (AP) and International Baccalaureate (IB) coursework and test scores in their evaluations. Several CEMOs described these scores as an increasingly important measure of academic rigor in a test-optional landscape, because “without the test, there’s even higher scrutiny” of the transcript. One enrollment leader from a broad-access public university described AP scores and coursework as helpful for determining merit scholarship awards, as they felt that taking these courses showed that students had a higher level of academic motivation for their continued education. “We’re limited on [scholarship funding],” this CEMO shared, “but we want to invest in the students who have the best return on the investment.” At the same time, a CEMO from a selective private institution noted that a reliance on AP scores only provided “a partial story” of a student’s academic ability, since students could choose which scores to report on their application and likely only reported their best scores.

Surprisingly, instead of increasing their reliance on other available academic measures, some institutions created their own standardized measures of academic potential. One selective private institution used data from past admissions cycles to create an algorithm that would predict a student’s approximate test score based on their GPA, the rigor of their curriculum, and their high school background:

For those who did not have test scores, the admissions team would get an estimated range of what that test score would have been based on. . . those data points. Then we used our same academic application review formula for all files.

This strategy allowed the institution to embrace a test-optional policy while avoiding any significant changes to its admissions and financial aid review process. Similarly, a flagship public institution used its historical data on test scores and GPA to devise an “imputed score” based on GPA alone for students without standardized testing. This allowed the institution to continue to use its standard system for awarding merit aid based on test score ranges. Although these institutions used exploratory strategies to innovate new academic measures, they used these new measures as inputs to replicate their traditional admissions and merit aid processes, falling into the competency trap. Rather than explore new strategies for equitably evaluating candidates with and without test scores, they recreated an approximation of test scores for students who did not submit them.

Alternatively, when confronted with the challenge of losing standardized test scores as a metric, several institutions devised new academic metrics to replace testing. One flagship public institution used historical testing and GPA data to create a new academic index based on students’ transcripts:

[Our research team] found out that four years of math and four years of science grades combined came within a tenth of a point of predicting an SAT math score for us. Four years of social sciences and four years of English approximated the verbal score pretty

closely. We created a new index using actually the weighted high school GPA to use as our decision point.

This approach offered an alternative decision-making criterion for the admissions team based on weighted high school GPAs, which was then supplemented by other factors in a holistic review process. At a broad-access public institution, the admissions team took a different approach and completely redesigned their evaluation process to focus on non-test academic data points. “We wanted to look at, without test scores, what are other factors that are critical, especially for our faculty.” The admissions team at this institution quantified academic ability using students’ grades in their highest level mathematics course along with a scale they developed internally to measure writing proficiency. These processes align with exploratory strategies for organizational decision making, as each institution searched for and experimented with new sources of academic data and adjusted their holistic processes to eliminate the use of test scores.

Although some of these creative academic indices were also used in awarding financial aid, several institutions described changing their financial aid policy to rely solely on a student’s GPA or transcript. While neither GPA nor a student’s curriculum are standardized measures of academic achievement (Zwick, 2017), institutions described taking a standardized approach to making aid decisions based on these aspects of the application. For example, a CEMO from a broad-access public institution explained:

We also used to require test scores for merit scholarships, and we have removed that from our scholarship awarding. Our merit awards are solely based on GPA. The GPA we use is an unweighted GPA based on our 16-course requirements that we have for students, and it’s through their sixth semester.

Other institutions took similar approaches, using specified portions of students’ academic profiles to determine scholarship awards in place of standardized testing. Several enrollment leaders from these institutions felt that using these new metrics allowed them to increase access to merit aid for a larger number of students but did not address whether grade inflation was a concern in the financial aid award process. One enrollment leader from a broad-access private institution shared that they also took measures to ensure that submitting test scores would not penalize students in their new calculations: “If the combination of the GPA and the test score generated a lower scholarship than GPA only, they got the GPA-only scholarship.”

Collectively, these institutions exhibited a range of exploration and exploitation behaviors in their approach to academic evaluation for test-optional admissions. Some institutions adapted to the test-optional landscape by developing sophisticated algorithms, imputed scores, and new academic indices to assess applicants’ academic abilities. These approaches all exhibited learning through exploration, as each institution experimented with new systems for

understanding students' academic credentials. However, the approaches of these institutions differed dramatically in terms of the end goal of their exploration. For some institutions, their exploratory processes were utilized to yield new measures that could be used to replicate test scores so that they could continue to implement their standard admissions and financial aid processes. Such institutions exhibited the classic characteristics of a competency trap, in which they sought marginal increases in performance and efficiency without exploring more transformational alternatives.

Engaging holistic processes

For some institutions, the transition to test-optional admissions prompted them to adjust their approach to holistic evaluation, redefining their emphasis on other parts of the application or increasing their use of contextualization tools. These institutions chose to lean into their established holistic review framework or to add new factors into their holistic processes. As an example of the former, an enrollment leader from a broad-access private institution described allocating more weight to non-test aspects of the application within their current rubric for application review:

Now we have to give different weighting to our rubric. . . looking more carefully at curricular aspects, recommendations, extracurriculars. We'd always looked at those things, but looking at them a little bit more carefully and giving them different weights in the process.

Similarly, enrollment leaders at two private selective institutions shared that their admissions team used the same holistic evaluation rubric as they did prior to the pandemic, but dropped the portion related to standardized testing. Other institutions also described relying more heavily on other parts of the application, such as students' transcripts, essays, and letters of recommendation, or looking more deeply for student qualities such as leadership, involvement, and consistent engagement in activities. Some institutions also shared that test-optional admissions did not significantly change the holistic review process that they had in place prior to the pandemic. A CEMO at a public selective institution shared:

The holistic review for us had the greatest emphasis in the decision process. None of that changed. . . if a student had a test score, it could be used as a factor just like it was before. If a student didn't have a test score, then we would be using their GPA and their grades just like we did before in the same way, just without test score. . . For us, the holistic review is to look at all the components that are in the file to understand how they come together.

The strategy of refining well-established holistic review processes is another example of a competency trap that many institutions fell into during their adjustment to test-optional policies. Although some institutions experimented

with adding new evaluation criteria to their holistic review, the majority of institutions implementing this approach made only incremental changes to their process.

Several institutions used contextualization tools to better understand students' secondary school environment. Leaders at these institutions discussed their use of the College Board's Landscape tool, which provided admissions officers with contextual information about students' high schools and neighborhoods, including information about AP coursework participation levels, median family income, and college attendance rates (Bastedo et al., 2022; Mabel et al., 2022). "That is a wonderful tool when you're assessing somebody you're not familiar with, the living and learning environment," shared a CEMO from a private selective institution. An enrollment leader from a selective public institution that had used Landscape in previous admissions cycles explained that the tool became more influential in the admissions process in the absence of test scores, in part because it helped the admissions team "to find out the level of the barriers or what students face in relation to what they were able to achieve within the school." A CEMO from another public selective institution also felt that the tool put student achievement in perspective, creating more favorable evaluations for many students from lower-income backgrounds who were high achievers within the context of their high school.

Some institutions also developed new approaches to contextualized admissions. The CEMO of one public selective institution described conducting an in-depth analysis of the curricular offerings at feeder high schools and creating a system for comparing course rigor among applicants. Similarly, another public selective institution used historical academic data on applicants from each high school in their pool in combination with the Landscape tool to gauge the rigor of current applicants' coursework. Enrollment leaders also discussed ways that holistic evaluation measures were incorporated into their financial aid processes. A CEMO from a broad-access public institution described "Relying more heavily on volunteerism, relying more heavily on essay writing, and those types of things that will give a more comprehensive review of a person." Institutions that sought out and began utilizing contextualization tools often exhibited more exploratory decision-making behaviors, searching for new information about applicants and changing their evaluation process in light of this additional context.

Similarly to the institutions that sought alternative academic measures, the institutions that engaged holistic processes in response to test-optional policies also exhibited a mix of exploratory and exploitative learning behaviors. Some institutions developed creative tools for understanding students' academic rigor, but many institutions used this strategy to slightly refine their current holistic processes, making minimal changes, if any, to their evaluation practices.

Implementing dual systems of evaluation

In a few cases, the shift to test-optional admissions policies led institutions to implement parallel systems of evaluation for students with and without test scores. Several enrollment leaders described using their typical admissions process for students who submitted standardized testing while using an adjusted process for students without scores. “If you submitted your test score, it was the same,” one CEMO at a broad-access private institution explained, “and if you didn’t submit your test score, we just apportion different weights to the GPA and to the other aspects of your application.” An enrollment leader from a selective public institution shared that their admissions team spent a significant amount of time redesigning their holistic review process for students who applied without testing, but used their previous system of review for students who submitted test scores. While these institutions continued to emphasize the importance of holistic review, some acknowledged that the academic evaluation was now based on different measures and that having test scores could be an advantage. A CEMO from a selective public institution shared how transparency with applicants was important in this dual-system process:

I think what we have to get to is while we’ll admit students to the university if they choose not to take a test, your best path to maximizing the opportunities at the university is probably going to be through a test score, and that’s just the reality.

Likewise, a CEMO from a selective private institution speculated about the possibility of developing two different rating systems for test-optional admissions beyond the pandemic, where ultimately, “there are going to be cases where standardized test scores are going to make us feel better about a decision.”

Dual systems of evaluation were also used in making financial aid decisions. In the most extreme cases, some institutions continued to require standardized test scores for certain merit scholarships, even when they were not required for admission. A CEMO from a broad-access private institution shared how they had implemented a tiered approach to scholarship determination:

When we went test-optional, we had to drop the ACT score [requirement]. What we did was, though, for the top-tier academic scholarships, you had to have an ACT score to still get those, but our lower-level academic scholarships you could get off of a GPA only.

This continued reliance on test scores for financial aid undoubtedly made scholarships less accessible for many applicants, who were likely unaware that they were being disadvantaged. An enrollment manager from a broad-access public institution described seeing a decrease in the number of students who were qualifying for higher-level awards after the shift to test-optional admissions because fewer students had the prerequisite test scores. “There is some

consideration being given to removing that criterion for the scholarship award this year,” the CEMO shared. “However, that’s still being discussed.”

In contrast, some institutions implementing a dual-system of financial aid awards felt that they were able to do so in a way that was equitable for all applicants. An enrollment leader at a selective private institution described how keeping an equity lens at the forefront of the process was important when implementing parallel award systems:

They trusted us that when we said that we will give them equal consideration, we gave equal consideration on every level. . . the percentage of the students who are scholarshiped in both groups are similar and the criteria is very uniquely not cross-compared. We literally have to run a parallel universe of a two admission system that is equitably run for that [test-optional] population only, which resulted in enough of a commonality except for the test score. One had a test score, one didn’t - you wiped the stuff away so you look at the GPA, curricular activities, their aspiration, other attributes that we look for in a holistic way of looking at them as a student.

By achieving similar levels of scholarships for students with and without tests, this CEMO felt that the holistic process for test-optional applicants was working: “All of them panned out to be equitable and fair.”

Institutions that utilized dual evaluation systems engaged both exploitation and exploration learning strategies in parallel. These institutions invested resources in exploring a new evaluation system for students without test scores while exploiting their typical evaluation process for students with test scores. In this way, while they didn’t necessarily succumb to the competency trap, neither did they completely avoid it. Moreover, implementing dual systems of admissions raises serious questions about equitable review among applicants as well as the sustainability of managing parallel processes. For these institutions, it remains to be seen how they will refine or reimagine their admissions processes moving forward should they continue to employ test-optional policies.

Perceived benefits of test-optional admissions

Despite the challenges previously discussed, the majority of enrollment leaders described the transition to test-optional and test-free policies as beneficial to their institution’s diversity, equity, and inclusion efforts. CEMOs frequently credited these policies with fostering greater diversity among incoming classes, particularly for increasing enrollment of underrepresented students of color, Pell Grant recipients, and first-generation students. The CEMO at one selective public institution also emphasized that this increase in diversity did not compromise the academic quality of the class:

Last year, we enrolled the most diverse class and the most academically talented class in [our institution’s] history. That’s looking at those measures, the number of AP, IB,

unweighted, weighted GPA, the number who are in the top 9 percent. . . they are people who more than meet our minimum requirements, they're competitive.

Many enrollment leaders believed that their previous testing requirements had served as a barrier for underrepresented student groups, discouraging application or making merit scholarships less attainable. Eliminating the use of test scores for scholarships not only broadened access to financial aid, one CEMO suggested that doing so signaled to students that their institution was committed to equity and inclusion. "I think the genie is out of the bottle when it comes to test-optional," this leader shared, "I don't think anybody can [return to mandating tests], especially anybody that's seen any kind of increase among underrepresented students. Anybody that goes back to requiring tests is going to be seen as anti-DEI." This point of view was widely represented among the CEMOs that we interviewed.

Finally, some enrollment leaders felt that the shift to test-optional policies had required them to reflect upon and improve their admissions and financial aid processes, with long-term implications. A CEMO from a selective private institution suggested that the new test-optional policy, along with the institution's commitment to student diversity, had led the admissions team to become more thoughtful about their practices:

It's things like looking at the financial barriers to applying to college, it's things like looking at the test requirements. It's looking about how we train and develop our admissions officers to understand cultural and racial context. Things like that. I think going through all of this work has contributed to that jump in the percentage of our admitted pool that are students of color. . . because our team, I think, better understands how to review applicants from different backgrounds.

This leader saw the steps taken to refine their holistic process and retrain their admissions staff as important steps on their institution's path toward long-term equity goals. Nonetheless, few CEMOs recognized that high school graduating classes are increasingly racially diverse, making it difficult to determine if their admissions policies are causing the increases in diversity that they report. They often did not consider whether the criteria that they now weigh more heavily, such as AP scores, coursework, or extracurricular activities, are being equitably evaluated (Park et al., 2023; Rodriguez et al., 2022; Xu et al., 2021). Additionally, application surges often led to a more selective and labor-intensive admission process, raising concerns for some CEMOs about equitable review of applicants in the absence of test scores, particularly if colleges were more likely to rely upon feeder schools in making admissions determinations.

Discussion and implications

These findings have important implications for institutions' long-term enrollment strategies and raise questions about the ability of institutions to adapt to

changes in the higher education landscape. While a number of institutions recalibrated and significantly changed their evaluative processes to account for the limited availability of standardized testing, many of these institutions fell into competency traps, directing their energy into refining their tried-and-true methods of admissions and merit aid distribution. In several cases institutions developed alternative admission processes for test-optional applicants but would not relinquish their traditional processes for students who submitted test scores. The inability to fully let go of standardized testing as a measure of achievement suggests that many institutions continue to believe that test scores are helpful, if not irreplaceable, in their processes, despite recent research that suggests that other measures of academic performance are more strongly correlated to college success (Bastedo et al., 2023a, 2023b). Institutions that struggled to adapt to test-optional policies, particularly less-selective institutions, may also risk losing their competitive advantage in the higher education market should test-optional policies continue to prevail post-pandemic. Several CEMOs suggested that the continuation of their test-optional policy would be dependent on whether their peer institutions remained test-optional. At the same time, institutions that successfully explored alternative options will need to find ways to ensure that their new strategies are sustainable, especially in the context of increasingly lengthy holistic review processes and potential surges in applications at test-optional institutions.

Along with implications for enrollment management, our findings also raise questions about equity in postsecondary admissions processes. Research has shown that college applicants who submit standardized test scores are fundamentally different from applicants who do not submit scores, where non-submitters are disproportionately represented by women, first-generation students, and low-income and underrepresented students of color (McManus et al., 2023; Syverson et al., 2018). Consequently, admissions processes that relied on separate tracks of admission or imputed test scores for applicants without testing may be failing to account for significant structural disparities between these groups. Given the preference exhibited by some enrollment managers for test scores, these processes may also unintentionally penalize students without testing, further raising equity concerns. However, recent research suggests that, conditional on test scores, racially minoritized and socioeconomically disadvantaged students are essentially equally likely to submit test scores as their white and wealthier counterparts (McManus et al., 2023). Shifts in the admissions process that increased the reliance on AP scores at some institutions may also have equity implications, as underrepresented students of color may have less access to AP coursework and exams as well as lower exam pass rates than white students (Xu et al., 2021). Additionally, holistic admissions processes and the use of contextualized admissions tools vary widely from institution to institution, with different systems of holistic

admissions yielding better results for underrepresented applicants than others (Bastedo et al., 2018, 2022).

Thus, regardless of the evaluation strategy institutions implement in response to the move to a test-optional admissions policy, it is important for institutions to reflect critically on how their processes might be contributing to structural inequities in access to higher education. As they try to balance access with both cost and excellence (Cheslock & Kroc, 2012; Harris, 2022), enrollment managers must be aware of the inequities that impact both standardized testing and non-test measures of academic excellence, and consider how their interpretation of academic data may lead to admissions decisions that continue to disadvantage underrepresented student populations. Furthermore, while many enrollment managers credited their test-optional policies with increasing diversity among enrolling students, it is likely that other policies and initiatives implemented during the pandemic played a role in driving these demographic changes, such as targeted and virtual recruitment efforts or pandemic-related stimulus funding for students. More research is needed to understand the reasons behind these demographic shifts and to determine if the increases in enrollment diversity are likely to continue.

The question of the longevity of test-optional and test-free policies implemented during the pandemic was at the forefront of many CEMOs' minds. While several enrollment leaders felt that IHEs in general were trending toward permanent test-optional policies, other CEMOs shared that their institutions were still in a piloting stage, and that their future policy would depend on the success of the current cohorts admitted under test-optional policies. At least one institution planned to return to requiring standardized testing after the pandemic, and another was planning to weigh testing more heavily in healthcare majors to curb rapid enrollment growth in smaller programs. Several institutions shared that they had never implemented test-optional policies and did not intend to do so in the future. Enrollment leaders also discussed additional barriers that would need to be overcome for them to implement test-optional policies long term, such as faculty resistance to test-optional admissions and state policies that encouraged or required students to take standardized tests either for admission or merit aid. In 2024, a small group of highly selective institutions returned to requiring standardized test scores as part of their admissions processes, raising questions about the impact of their decision on applicants from underrepresented student groups. Thus, while test-optional admissions and financial aid policies have burgeoned since the onset of the COVID-19 pandemic, the permanence of these policies at some institutions remains uncertain.

Finally, this research potentially addresses the puzzle of why we have seen such modest diversity gains in the face of test-optional and test-free policy adoption (Belasco et al., 2015; Bennett, 2022). Throughout our findings, we see varying, cross-cutting themes with respect to equity. On

the one hand, many institutions more fully embraced contextualized, holistic review practices, and leaned into the use of contextualization tools that have been shown to increase the probability of admission for underrepresented students (Bastedo et al., 2022; Mabel et al., 2022). A few institutions were quite intentional in ensuring equal probabilities of admission for those who submitted and withheld test scores. On the other hand, seemingly similar institutions created dual evaluation systems or replaced test scores with indexes of undetermined validity, or required test scores for valuable merit scholarships that could strongly influence the probability of enrollment. In the face of such contradictory organizational decision making, it is not surprising that the impacts of test-optional and test-free policies on campus racial and socioeconomic diversity may look like a wash in the aggregate. Future research should examine how nuances in the implementation of test-optional policies may impact campus diversity over time to ascertain whether certain test-optional admissions strategies yield better results toward improving access for underrepresented student groups.

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