

Keys to Thriving Enrolments in the New Economy

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Jay W. Goff

Vice-President of Enrolment and Retention Management

Saint Louis University

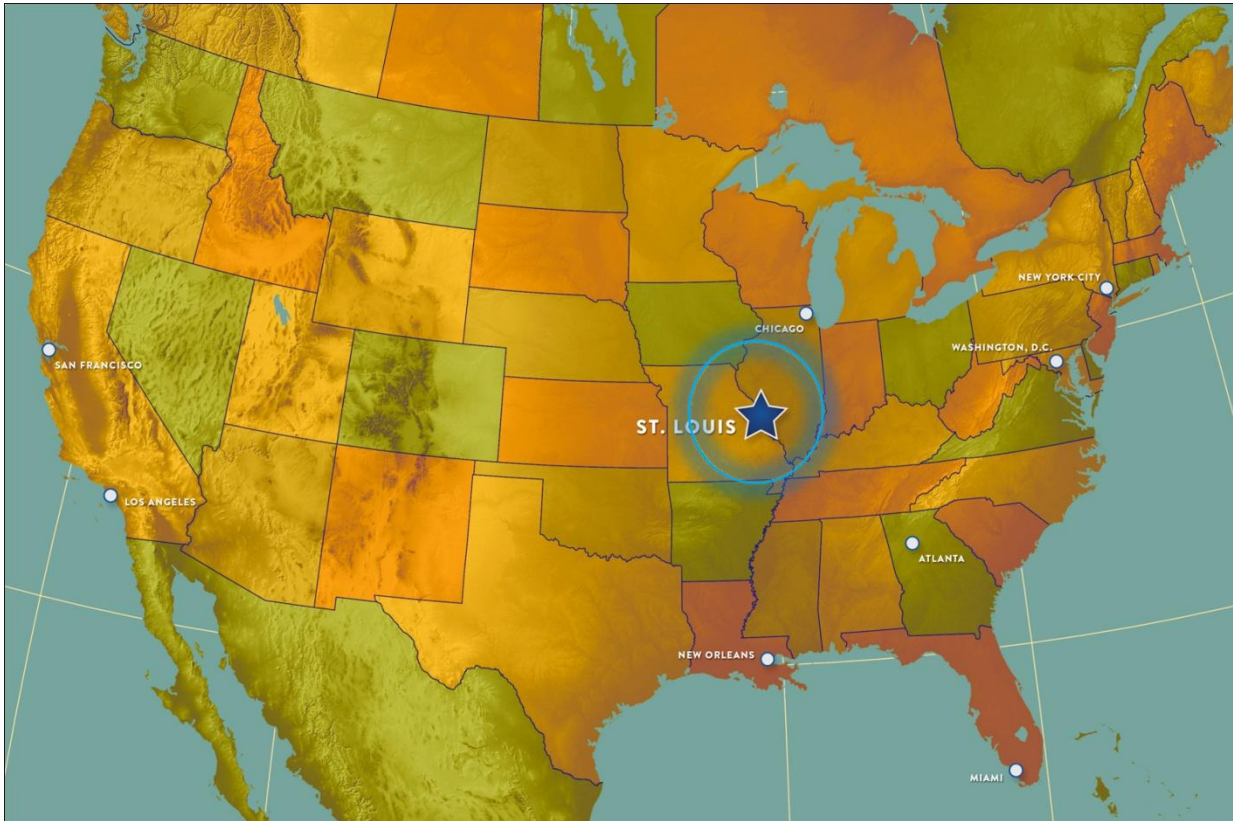
AACRAO SEM Conference Coordinator

WHY ARE WE HERE TODAY?

The external environment colleges and universities operate in is changing quickly

- **Dramatic changes in student markets**
- **Public expectations for a wide variety of high quality student services**
- **Shrinking government funding**
- **Greater needs for an institution-wide understanding of how to best react to the emerging student trends, needs and markets**

Where is St. Louis, Missouri?



SLU CAMPUS

- 25 km from Lambert St. Louis International Airport
- 480 km from Chicago

SLU Campuses

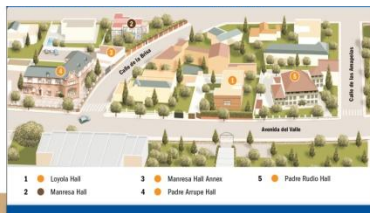
235 Acres • More than 90 Buildings • 7 Museums and Galleries

Saint Louis University

ONE N. GRAND BLVD.
ST. LOUIS, MO 63103



Madrid, Spain



FIND MORE AT WWW.SLU.EDU/CAMPUSMAP/

The City of St. Louis



- Population: 2.8 million, 18th largest U.S. metropolitan area
- Founded: 1764
- Transportation hub of the central United States
- Borders the Mississippi River & 2nd largest inland port
- 21 Fortune 1,000 companies in the region
- National center for health care and bio-technology research
- \$17.6 billion USD annual business expenditures

About Saint Louis University

- One of America's most prestigious Catholic, Jesuit universities
- Founded in 1818
- 2nd oldest Jesuit university in the United States
- Noted for its rigorous academic excellence, research and scholarship, and nationally ranked programs



Rankings: Among the Best in the U.S.



- *U.S. News & World Report* "America's Best Colleges" and "Best Graduate Schools"



- *Princeton Review* "Best 376 Colleges"



- *Parade Magazine* "College A-List"



- *Forbes* "America's Top Colleges"

Students and Faculty



Total enrolment:	14,073
Undergraduate enrolment:	8,670
Graduate enrolment:	5,403
Student-faculty ratio:	12-1
Average class size:	24
Faculty:	3,186
Percent of full-time faculty with “terminal” degrees:	99%

SEM Can: Help More Students, Institutions & Nations Succeed



Why Does Your Position Exist?



Leadership Concerns

Higher education leaders and national media:

1. *What do recent economic upheavals mean to colleges and universities?*
2. *What are the fundamental issues facing higher education in the coming decade?*
3. *Do we face unprecedented long term economic circumstances and challenges?*
4. *What must institutions be doing today to respond to issues and challenges?*

What We Learned:

- *Our fundamental challenges remain unchanged, but the urgency to address those challenges will be accelerated by economic necessity.*
- *Higher education as an industry will undergo transformations similar to those experienced by other industries over the last 50 years.*
- *Changes in technology and the global economy point toward solutions to these issues.*

Remember the Happy Pirate: Adjusting to Change & New Tools



Keys to Thriving in the Future

Moving to a Buyer's Market

Keys to Thriving enrolments in the New Economy:

1. Focus Communications on the Value and Outcomes of the Student Experience
2. Manage in a Business Like Fashion – Capacity Management
3. Push Retention Efforts to Implement Fundamentals
4. Beef Up Financial Aid Staff and Support
5. Support the New Majority: A Transfer Student Friendly Programs
6. Make Pre K-20 Planning and Programs a Fundamental Business Practice

SEM Primer

Strategic Enrollment Management

The Student Success Continuum

The enrolment Management Perspective

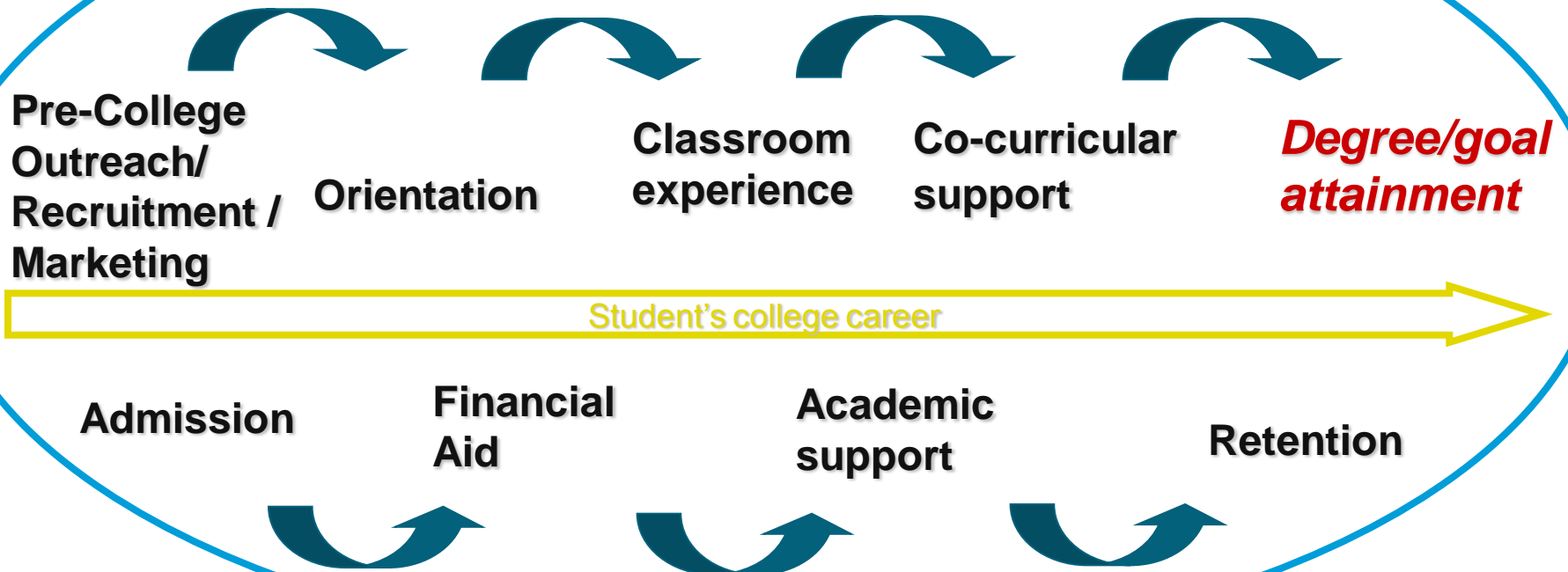


CHART SOURCE: Bob Bontrager, AACRAO SEM

What is SEM?

- Strategic enrolment Management (SEM) is “a comprehensive process designed to help an institution achieve and maintain the optimum recruitment, retention, and graduation rates of students where ‘**optimum**’ is designed within the academic context of the institution. As such, SEM is an institution-wide process that embraces virtually every aspect of an institution’s function and culture.”

Michael Dolence, AACRAO SEM 2001

Research

Recruitment

Retention

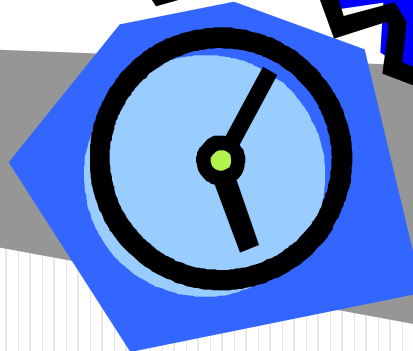
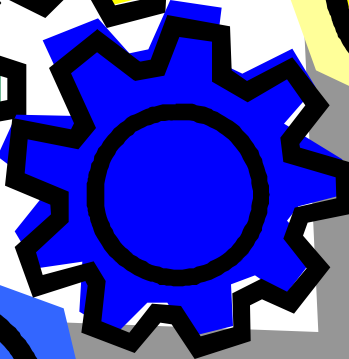
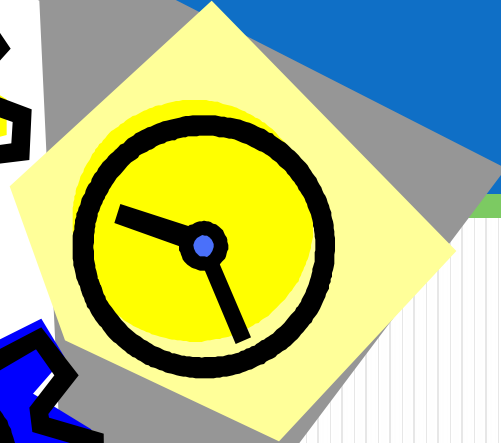
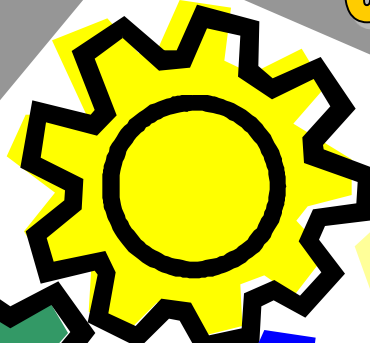
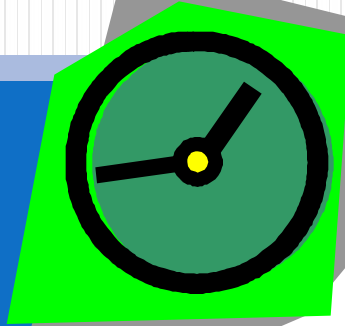
Mission

enrolments

Budgets

Facilities

Programs



Core Enrolment Principles

- No enrolment Effort is Successful without **QUALITY** Academic Programs to Promote
- Recruitment and Retention is an On-going, Multi-year **PROCESS** with Strong Access to Research and **DATA**
- +80% of enrolments Come from **REGIONAL** Student Markets for BS/BA Degrees
- The Most Successful Recruitment Programs Clearly **DIFFERENTIATE** the Student Experience from Competitor's Programs
- The Most Successful Retention Programs Clearly Address Students' Needs and Regularly **ENGAGE** Students in Academic and Non-Academic Programs

SOURCE: Jay W. Goff, 2004

Role of the Enrolment Manager

“enrolment leaders serve many roles throughout the change management process, such as that of a visionary, encourager, storyteller, facilitator, arbitrator, problem solver, manager and coach.”

Jim Black, AACRAO SEM 2003

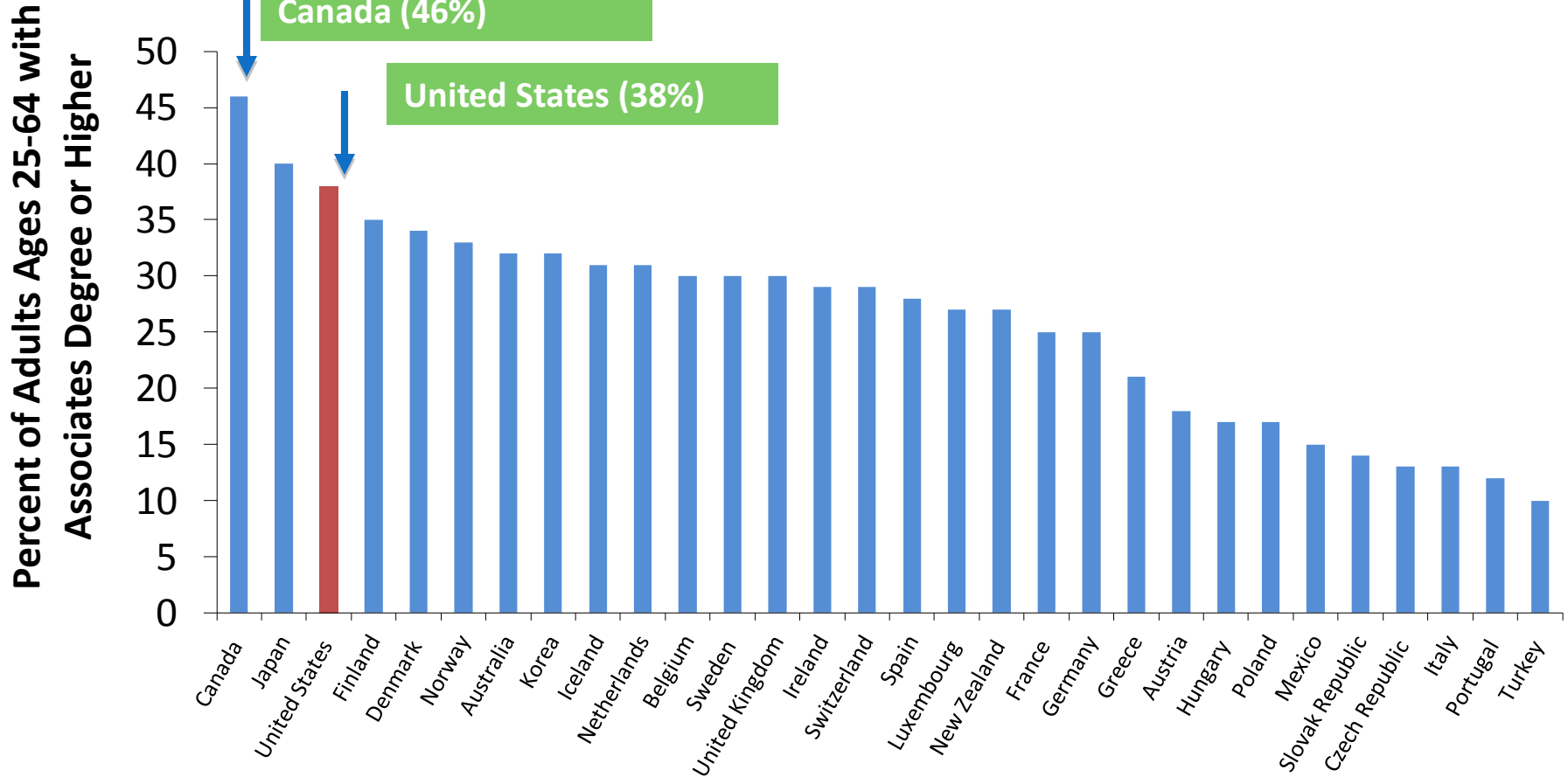
**Enrolment Managers are Systems Thinkers
Adept at Influencing **Change****

Environmental Scan

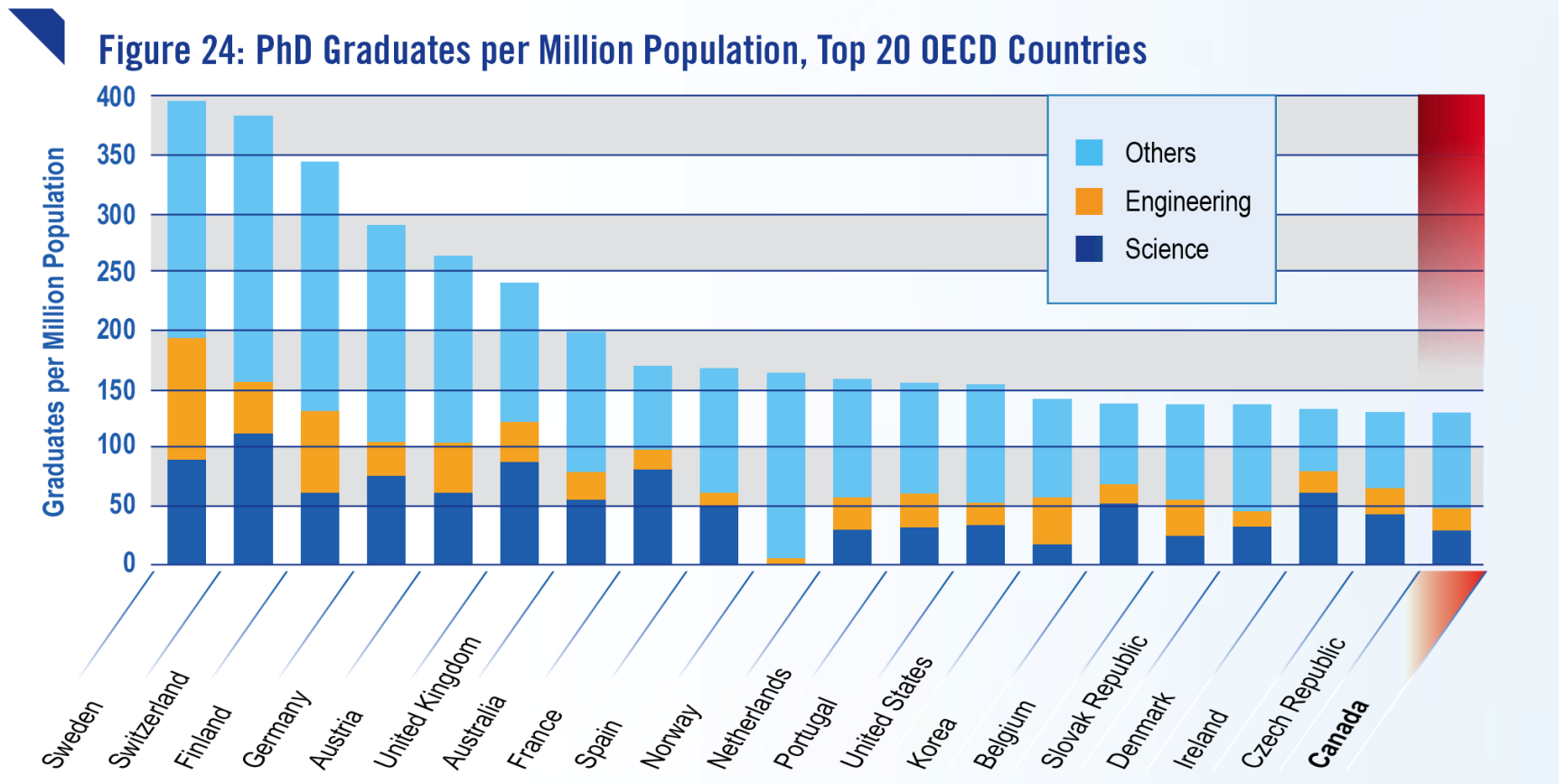
Canadian Universities & Colleges



Canada: 1st Out of 30 OECD Countries in Overall Postsecondary Attainment



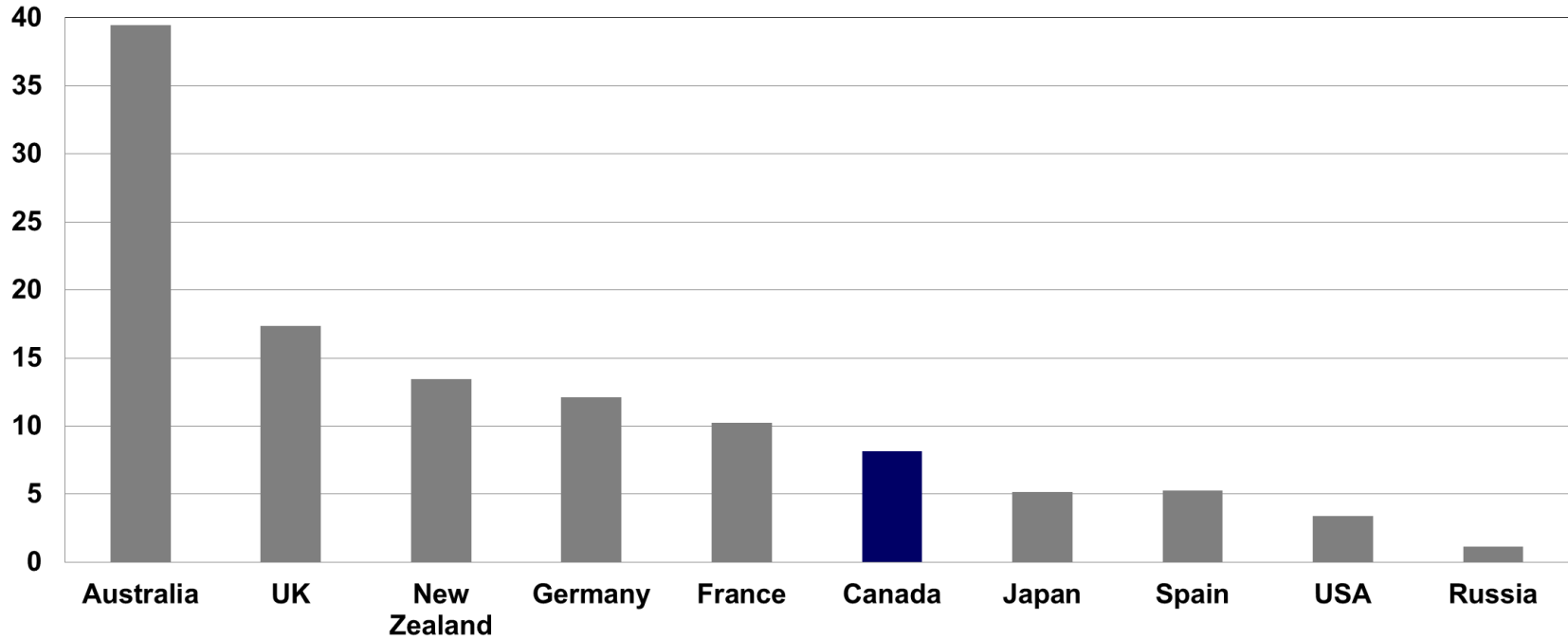
Graduate Enrolment Challenges



Sources: OECD, Main Science and Technology Indicators, 2006;
 Science, Technology and Innovation Council, Canada's Science, Technology and Innovation System.
 State of the Nation. 2008

On a domestic-international balance level, Canada is placed mid-tier

International Students by 100 Domestic Students in Higher Education (2009)



Need for Completed Degrees in the US

Assuming current rates of college attendance, persistence and “off shoring” do not change, analyst Anthony P. Carnevale concludes that **by 2012 the U.S. will face a cumulative 10-year shortage of:**

- 850,000 associate degrees
- 3.2 million bachelor’s degrees
- 2.9 million graduate degrees

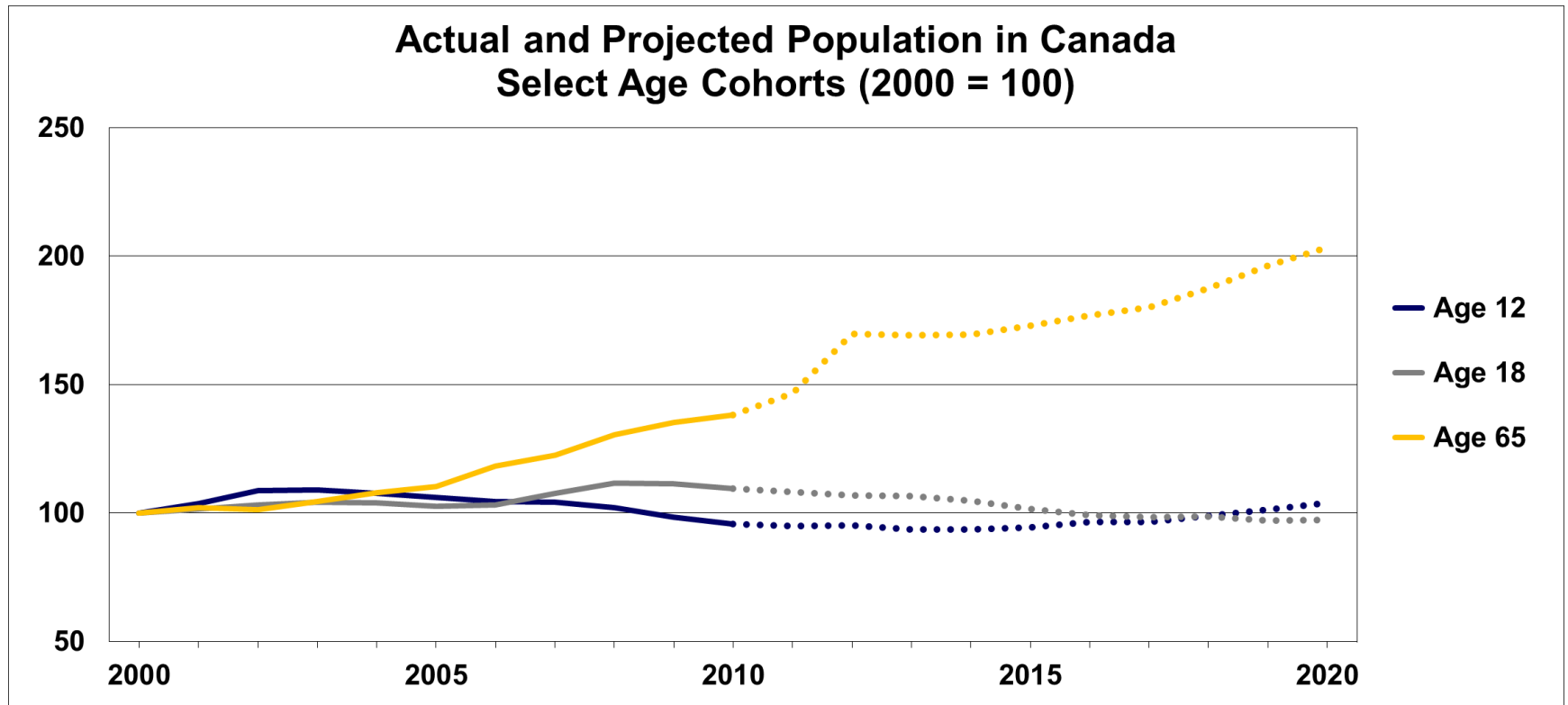
National Center for Higher Education Management Systems:

- 55% of the population will need college degrees by 2025 in order to equal degree attainment in top-performing countries, a potential “degree gap” of 15.6 million

Future Students: Demographic and Population Changes

- Fewer first-time, traditional students in the overall pipeline until between 2010-2017—while older population is growing
- More students of color
- More students of lower socioeconomic status
- More students unprepared college level work
- *More students likely to struggle with traditional college experiences and expectations*

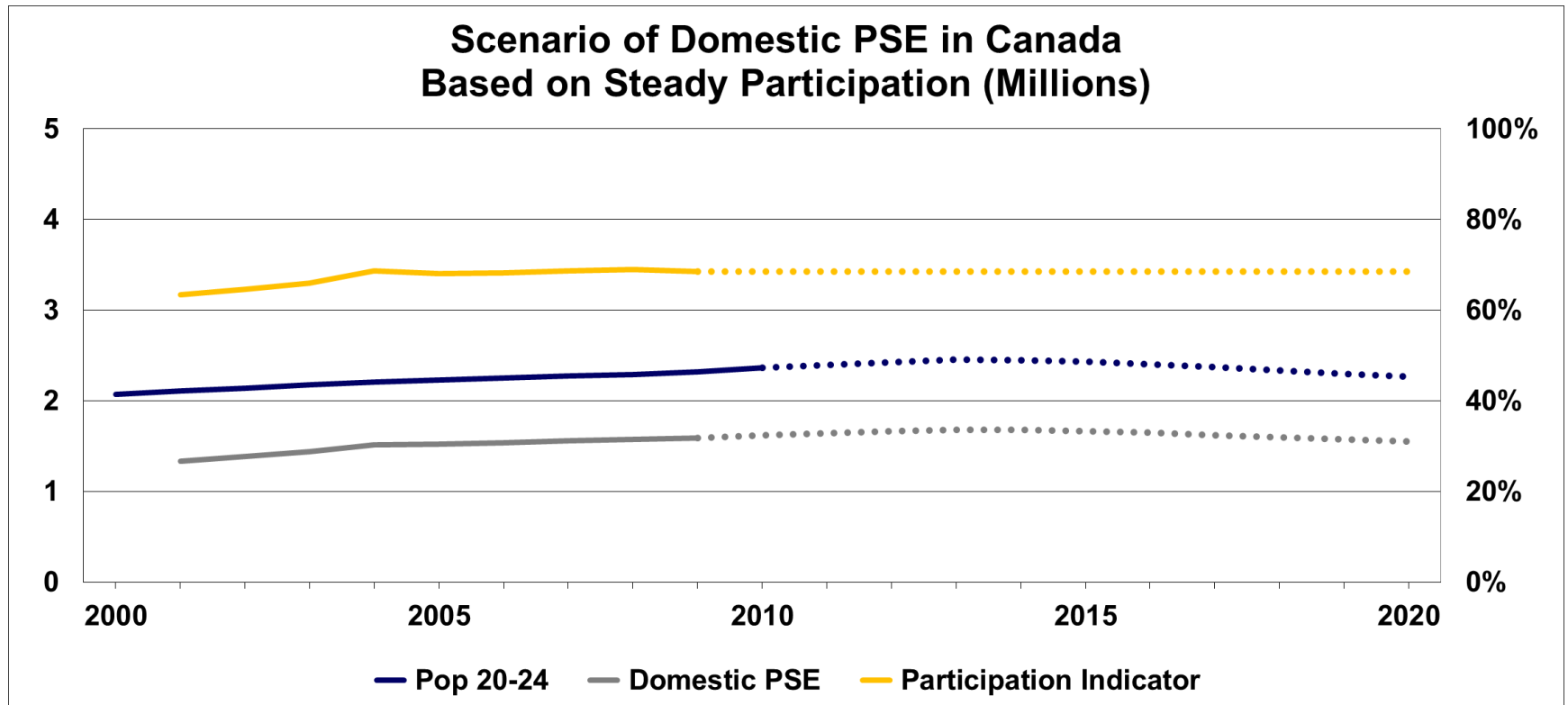
Education age cohorts will shrink in the coming years



Notes: The dotted lines indicate projections by Statistics Canada.

Source: Statistics Canada.

Post-secondary Enrollments are Likely Peaking

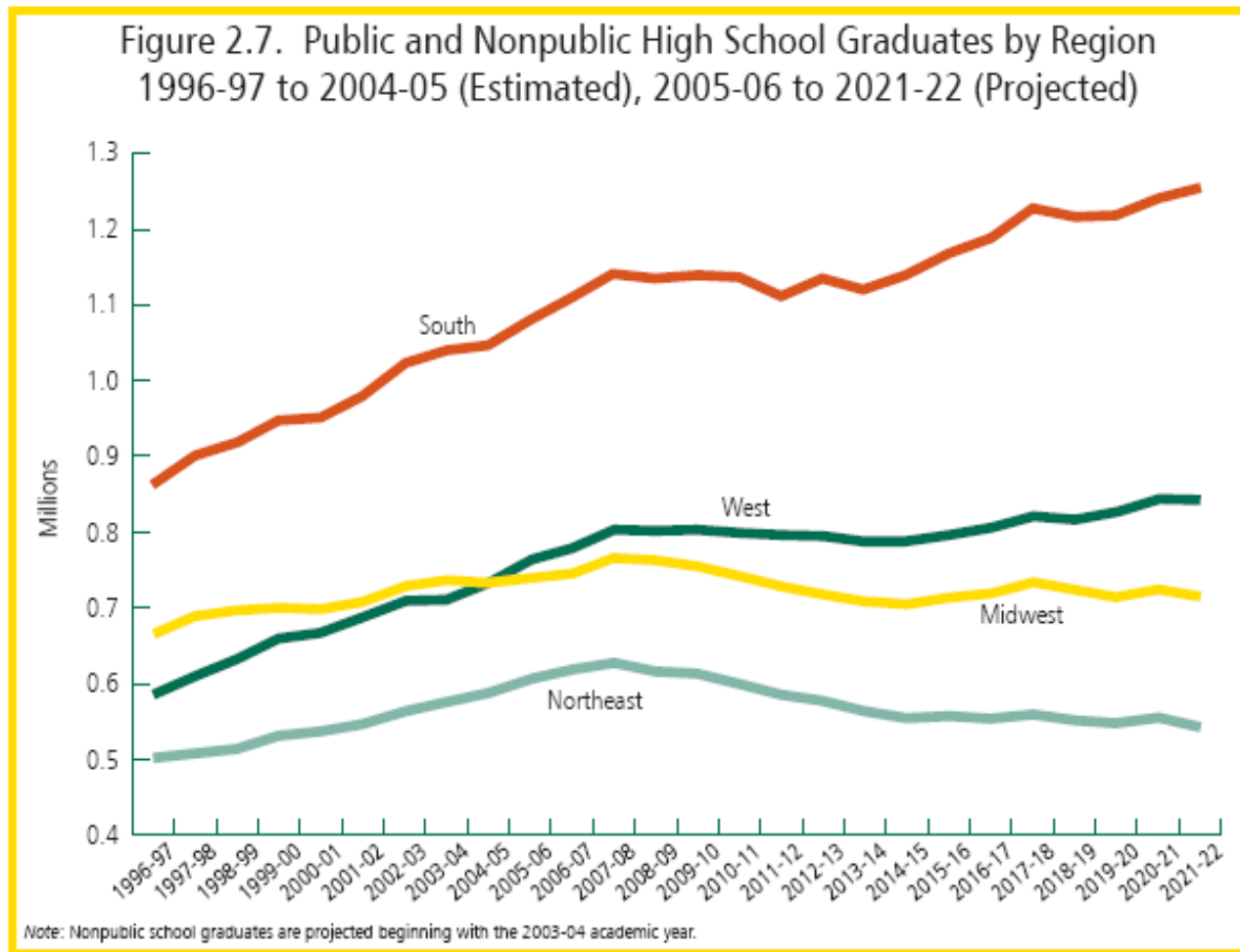


Notes: The left axis measures domestic post-secondary enrollment and population in millions. The right axis measures the "Participation Indicator", which is the ratio of "Domestic PSE" over "Pop 20–24", as a percentage. Dotted lines indicate projections. The population projection is by Statistics Canada. The domestic enrollment projection is obtained by multiplying the "Participation Indicator" by "Pop 20–24", taking the "Participation Indicator" as constant.

Source: Statistics Canada and Statistics Canada PSIS.

2011-2017

3% to 8% Annual Declines in Traditional Students

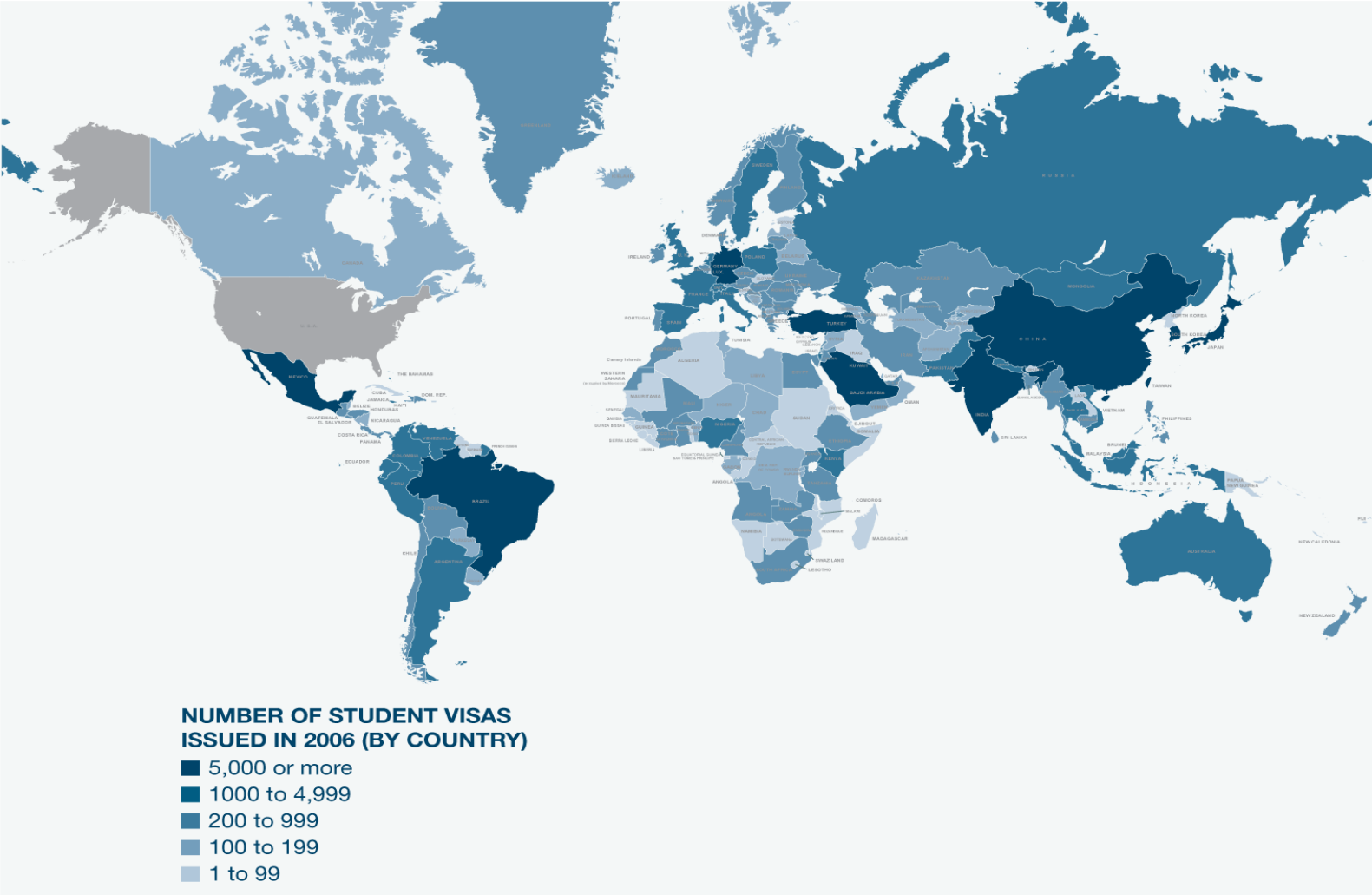


Female enrolments Exceed 57% of All College Students

UNDERGRADUATE ENROLLMENT: Total undergraduate enrollment in degree-granting 2- and 4-year postsecondary institutions, by sex, with projections: Fall 1970–2015



enrolment Planning should be Global



76% of families would be
“somewhat” or “very likely” to
consider a more expensive
institution if it could deliver
greater value.

SOURCE: Longmire & Company, Inc. 2009 “Study of the Impact of the Economy on enrolment”

2010 e-expectations report

- 46% claimed the current economic crisis caused them to reconsider the schools they would apply to or attend—an increase from 34 percent just last year.

SOURCE: 2010 E-Expectation Report – OmniUpdate/NRCCUA/Noel Levitz https://www.noellevitz.com/NR/ronlyres/52057241-5FD7-450E-8399-C772C1F9A3F9/0/EEExpectations_FocusingYourERecruitmentEfforts_0710.pdf

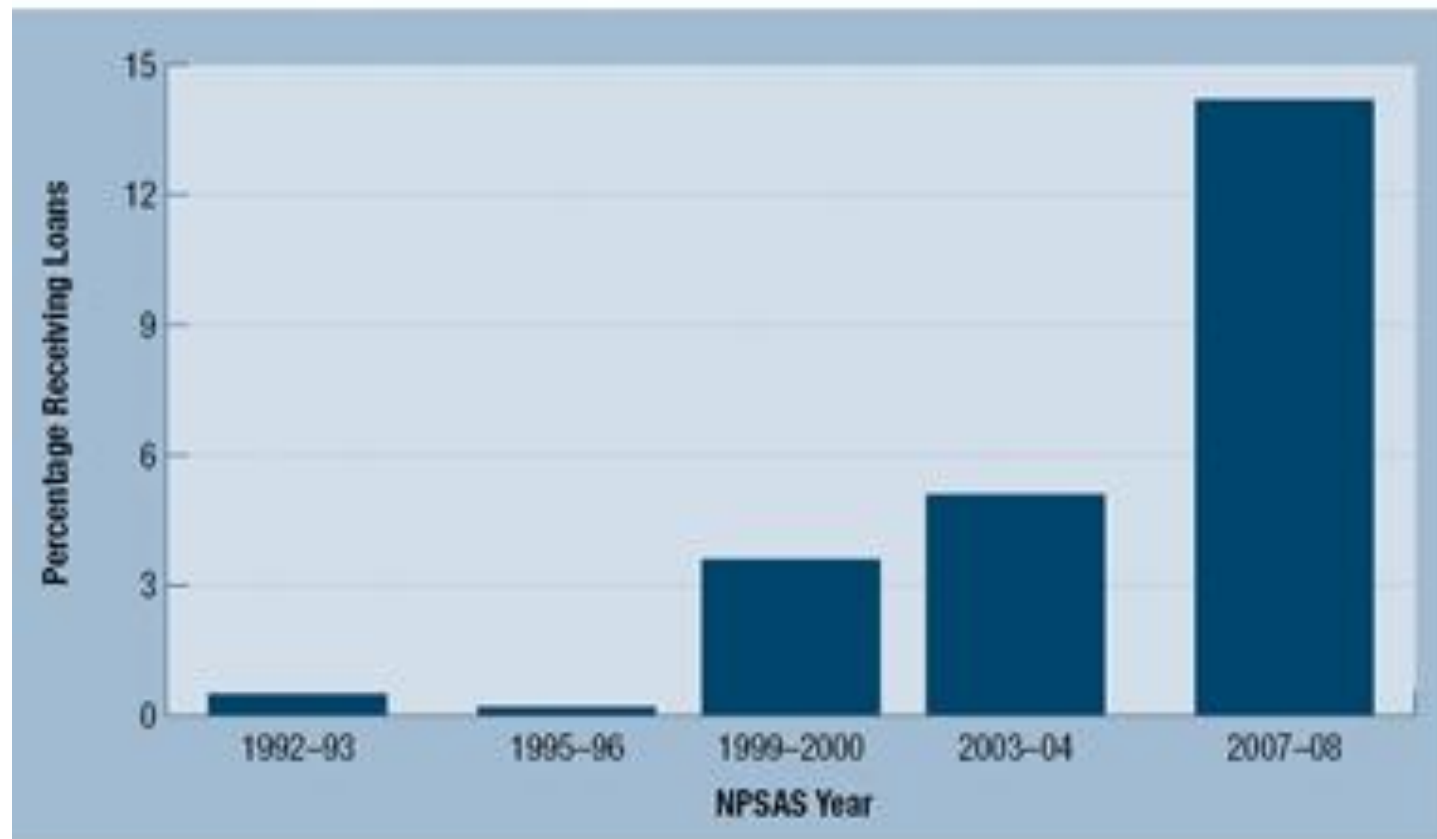
Electronic Experience Expectations

- 1 in 4 students reported removing a school from their prospective list because of a bad experience on that school's Web site.
- 92% would be disappointed with a school or remove it entirely from their lists if they didn't find the information they needed on the school's Web site.

As college prices have escalated while family income growth has stalled, student debt has increased dramatically in recent years.

Private Student Loan Markets Expected to Boom

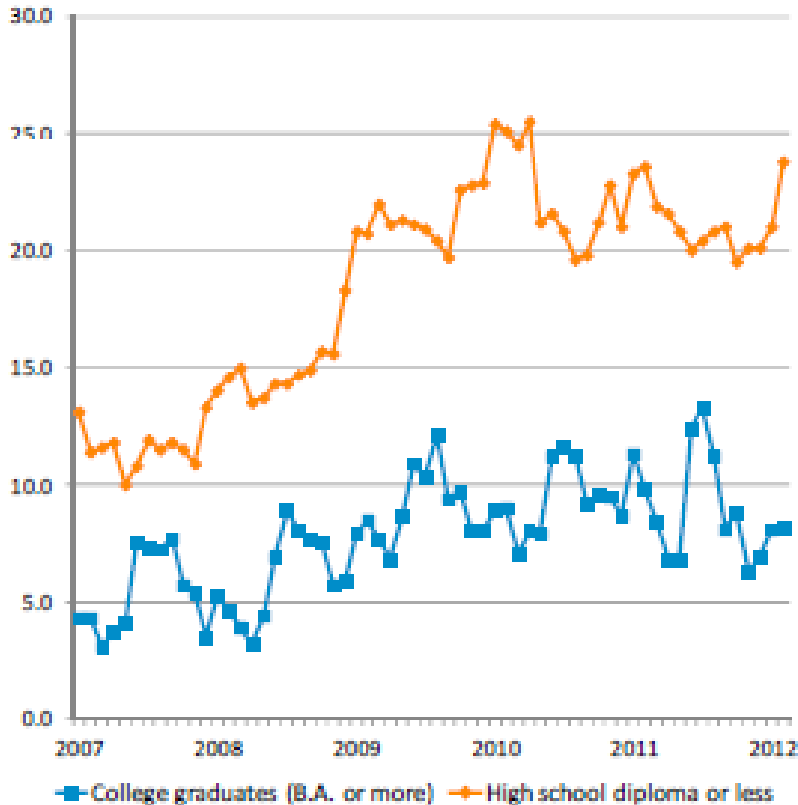
Chart 4. Percentage of All Undergraduates Receiving Private Student Loans



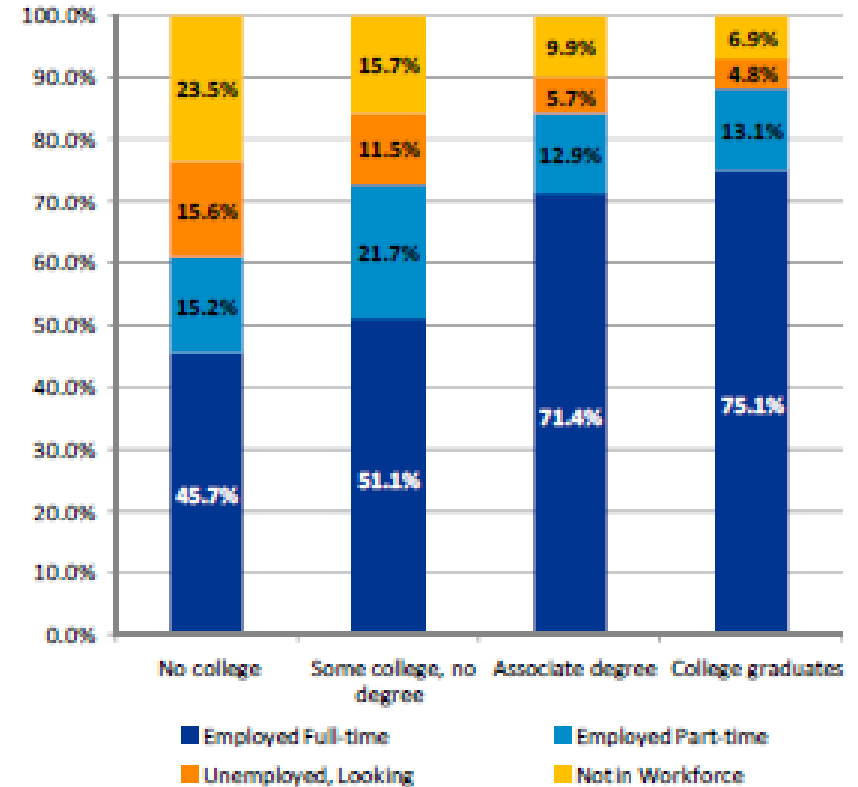
Source: U.S. Department of Education, National Center for Education Statistics, National Postsecondary Student Aid Survey (1993-2008). Author analysis with Undergraduate Data Analysis System.

College Degree Greatly Enhances Likelihood of Employment for Young Adults

Unemployment Rates for 20-24 Year Olds



Status for All Non-Enrolled, 20-24 year olds



Source: Bureau of Labor Statistics, Current Population Survey, March 2012

1. Focus Communications on the Value of the Student Experience & Degree Completion

Demonstrate Quality related to:

- Institutional Mission
- Student Learning
- the Public's ROI

“Governing boards and institutional leaders must move beyond the ‘iron triangle’ of seemingly conflicting choices – improving quality, increasing access, and yet constraining costs – toward a ‘culture of accountability.’”

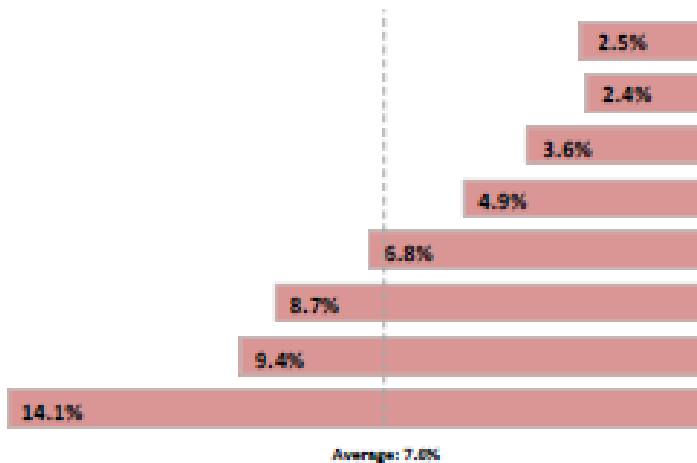
- *Moving Beyond the Iron Triangle, Arne Duncan, U.S. Secretary of Education, Trusteeship (Association of Governing Boards of Universities and Colleges), September / October 2009.*

Keys to Attracting and Enrolling Students

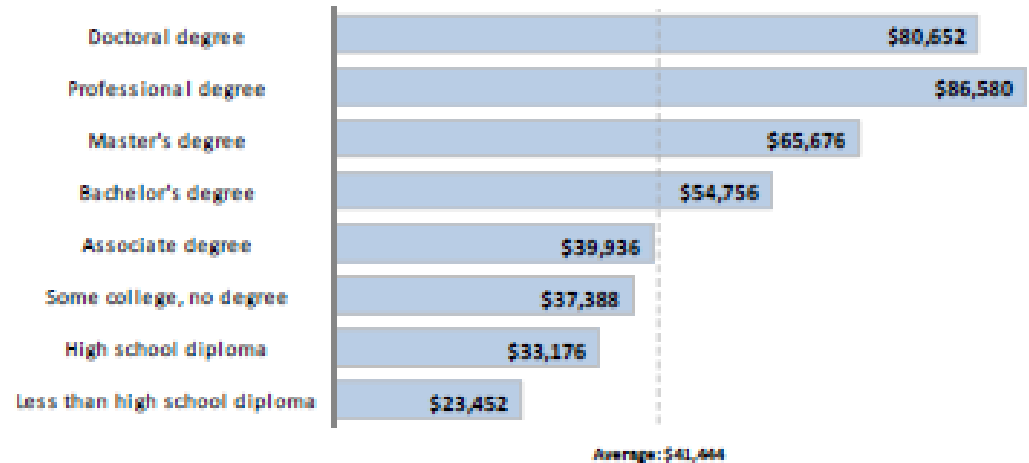
1. Sending the **right message** to the right students, at the **right time**, in the **right format**
2. The development and management of a **multi-level prospective student communication plans**
3. Consistently sending our messages through **well-trained, committed, caring individuals** across the campus
4. Having the **appropriate resources** to implement the plans

Education Pays

2011 Unemployment Rate



2011 Median Annual Earnings

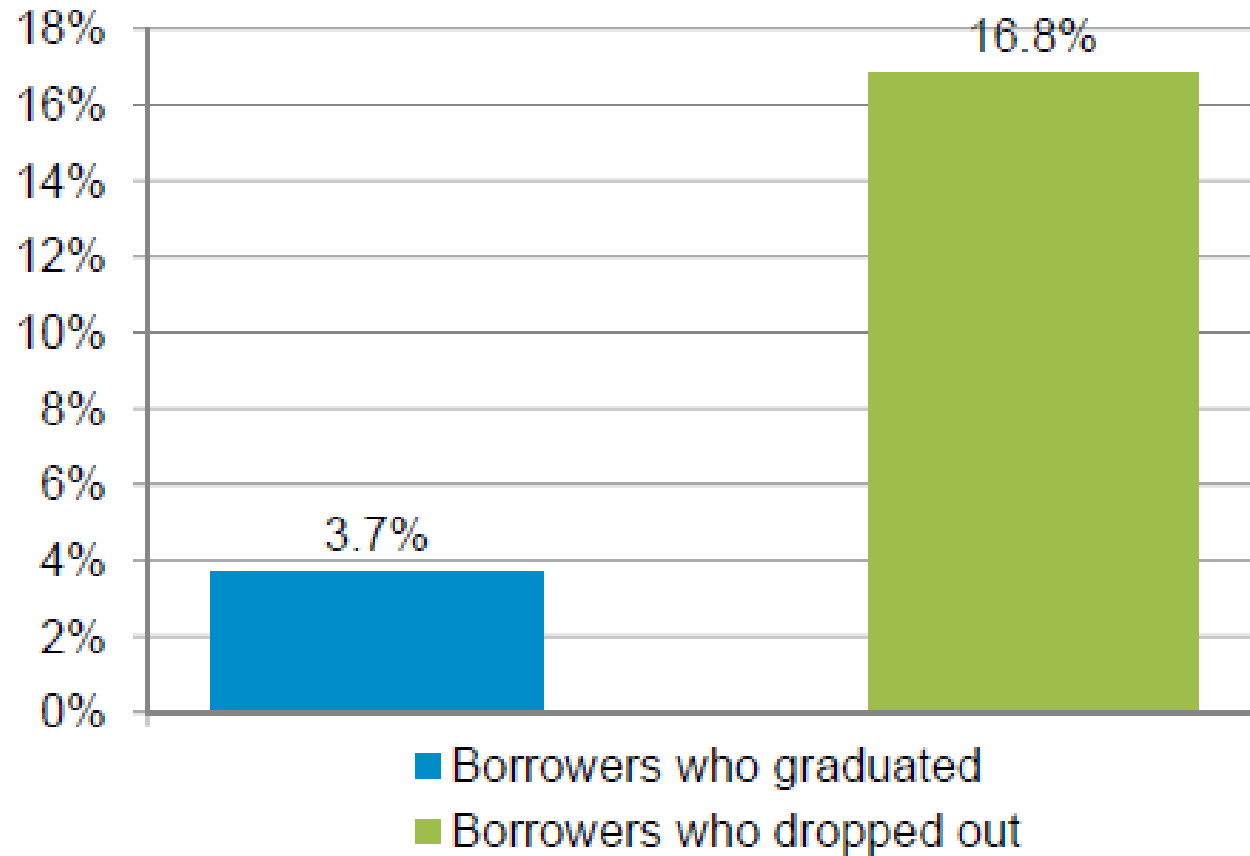


30% of the total population ages 25 and older held a Bachelor's degree or higher,
43% had a high school degree or less

Sources: Bureau of Labor Statistics, Current Population Survey
Data are for age 25 and over, earnings are for full-time wage and salary workers

Graduation Lessens the Chance of Default

Default Rates



Source: Education Sector, Degreeless in Debt

Focus Communications on Outcomes and Value

1.

We're one of America's top technological research universities.

2.

Our students get great jobs at great salaries.

3.

Our students graduate with the ability to address real-world problems.

4.

We're one of America's "30 safest campuses."

5.

S&T is one of the top 10 "best value" national public universities.



TOP
5
things
YOU need
to KNOW



Over 600 Corporate Partners and Hiring Organizations



MONSANTO



ADM



CISCO



Honeywell

GARMIN

HALLIBURTON

GOODYEAR



JOHN DEERE



CENTEX



MERCK



IBM



CERNER
All Together

TOYOTA

3M

P&G

DUPONT



ConocoPhillips

Pfizer

SAP

ORACLE

Microsoft

Burns & McDonnell
SINCE 1898



LOCKHEED MARTIN

Barry-Wehmiller

ExxonMobil

Peabody

Cargill



Kiewit



EMERSON

NORTHROP GRUMMAN



accenture

Tenaris

Ameren



PETRONAS



Alberici



noranda



HAMILTON SUNDRAND

A United Technologies Company



US ARMY
CORPS OF ENGINEERS

JE JACOBS

CONSOL ENERGY

Career Success for Grads

3-year Averages

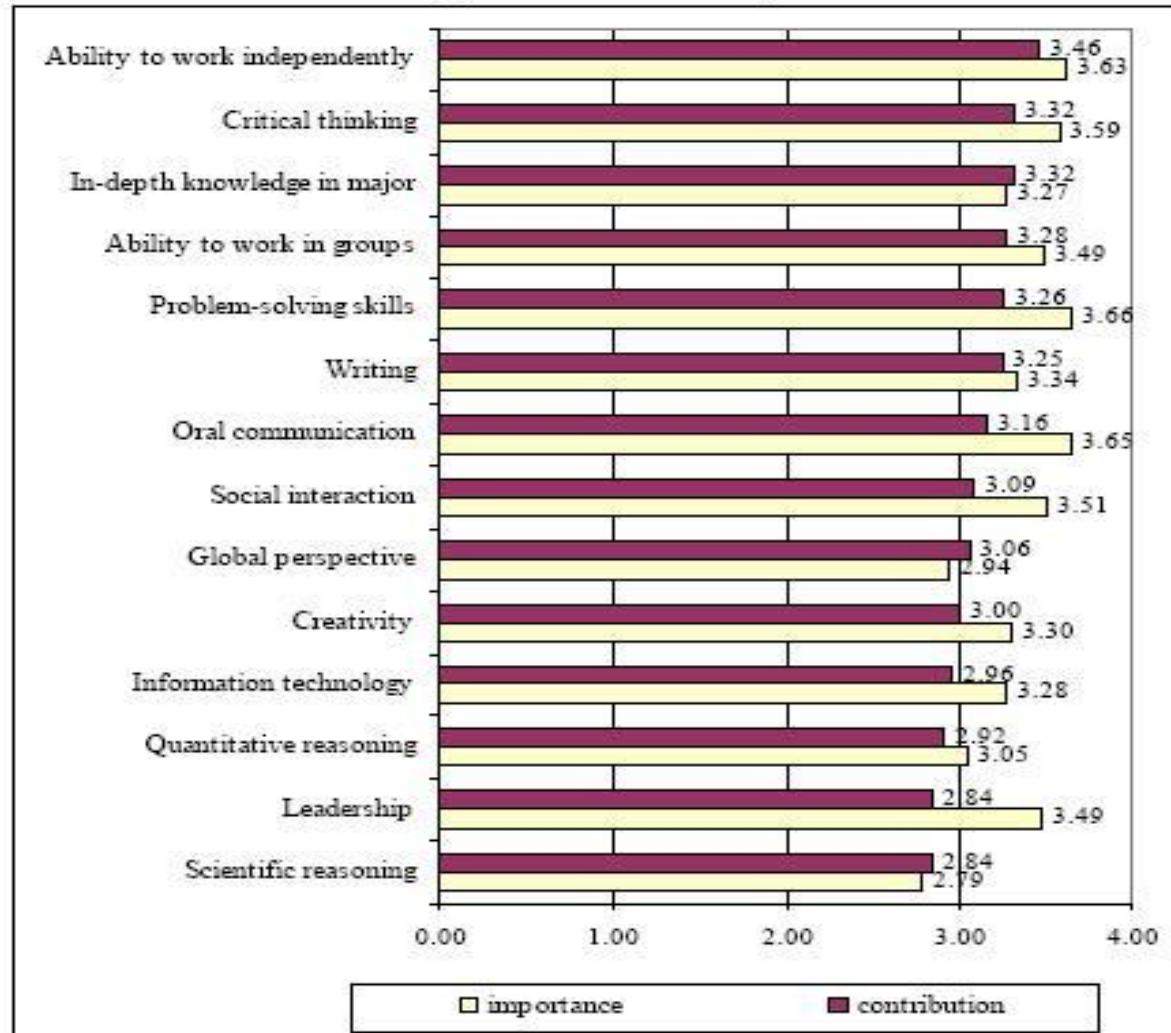
Midwest's Largest Career Fair

- Over 660 Companies recruit on campus:
 - +4,250 on-campus interviews
- Average starting salary for graduates at commencement:
 - over \$57,300
- Over 500 students completed a co-op or internship for +160 companies around the world
 - \$2,650 average monthly co-op salary
 - \$2,875 average monthly internship salary
- 90% of grads have secured firm plans at graduation
- Mid-career average salary for all graduates:
 - \$95,200 (Payscale.com, August 2009)
- Many top corporations, such as Shell Oil, Caterpillar, Toyota and Boeing list Missouri S&T as a “Top 20 Key School” for finding their future leaders



Promote Learning Objectives

Mason's Contribution and Current Importance: Mean Comparison



Where Innovation Is Tradition

Emerging Trends

- Ability to clearly explain the value of our programs to all stakeholders: Use accreditation material in all communications
- Promoting success stories with regard to access, affordability and outcomes for individuals and society
- REMEMBER: The public is inclined to support costs associated with maintaining program quality and rigor when paired with sound management practices including appropriate efficiencies

2. Manage in Business-like Fashion

Capacity Management and
Diversifying Revenues in the Context of an
Institutional Business Model

Guiding Philosophy at George Mason University

“An institution of higher education should not be run like a business, but it should be run in a business-like fashion.”

- Alan Merten, President, George Mason University

Paradigm Shift

Measuring quality based on educational outcomes instead of spending per student.

Capacity Task Force Charge

Assess whether the student population was at, below, or above the university's capacity to provide each student with a quality education.

Defining Capacity

- Educational capacity is a complex management issue and incorporates many variables for any college or university
- Capacity ultimately is a **planning and quality assurance concept.**
- Generally defined:
 - “Educational capacity is the university’s ability to receive, enroll, house, feed, and properly educate students in an appropriate time period.”

Key Factors in Determining Capacity

- Quality Teaching and Learning
- enrolment and Research Growth
- Teaching Loads & Instructional Faculty Numbers
- Instructional and Laboratory Space
- Student Financial Assistance Resources
- Student and Campus Support Resources
- Housing, Dining and Parking Volume

Emerging Trends

- Colleges and universities need to know their true service capacity
- Understand your institutional business model and what activities specific revenue streams are supporting. Be prepared to explain how tuition and student fee revenues directly benefit activities with which students are engaged
- Develop revenue sources other than tuition revenue to supplement research, public service and other non-instructional activities

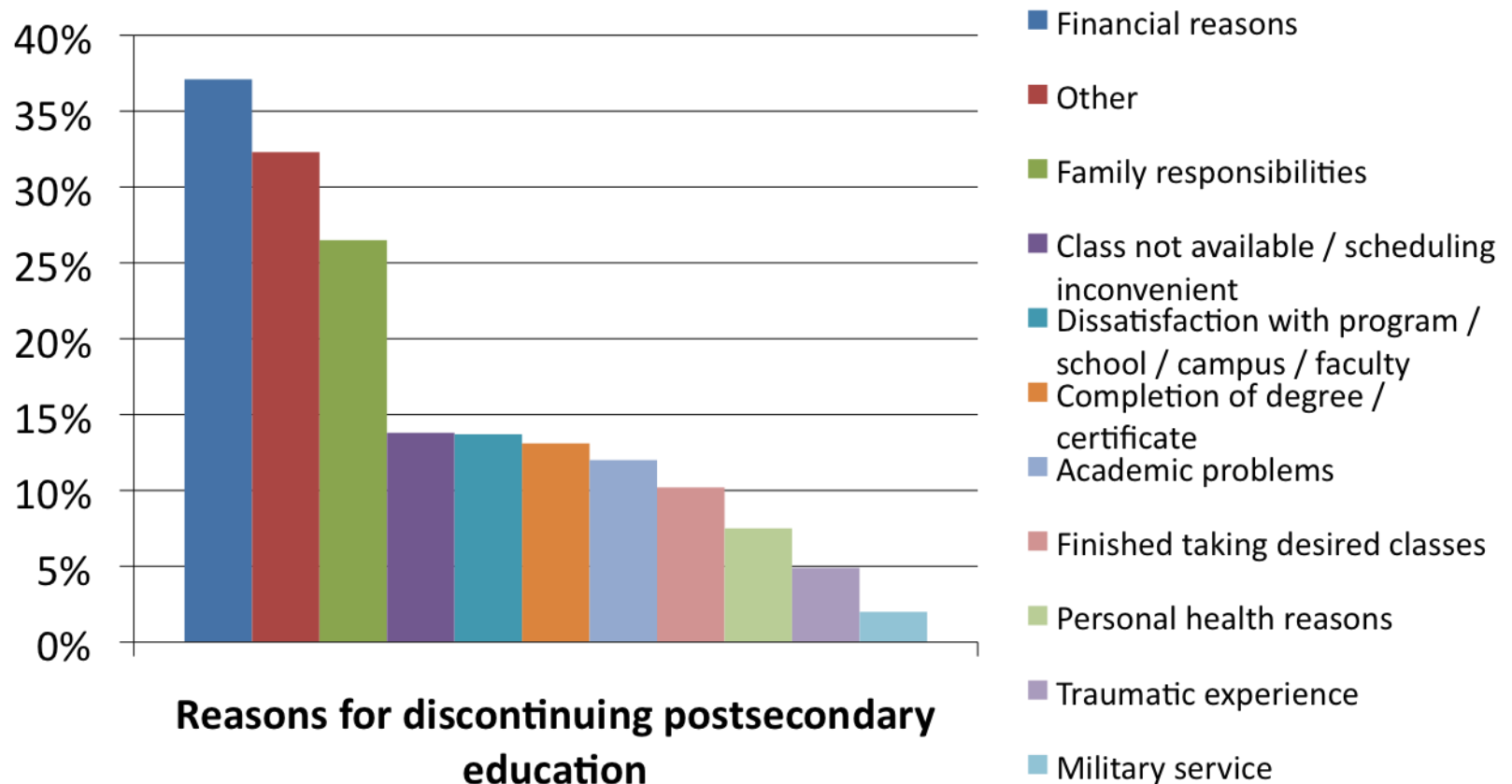
3. Push Fundamental Retention Programs

Implement Fundamental Structures and Improve Engagement from a Student/Family Perspective

Fundamental Student Retention Conclusions

1. Financial aid helps increase persistence for students who need and receive financial aid.
2. Student populations will historic persistence problems
 - Older students
 - African Americans & Hispanics
 - Students who work more than 30 hours weekly, and
 - First generation college students
3. Schools can improve retention rates by:
 - Accurately determining when and why students withdraw
 - Up-to-date information helps administrators determine better strategies for increasing retention rates

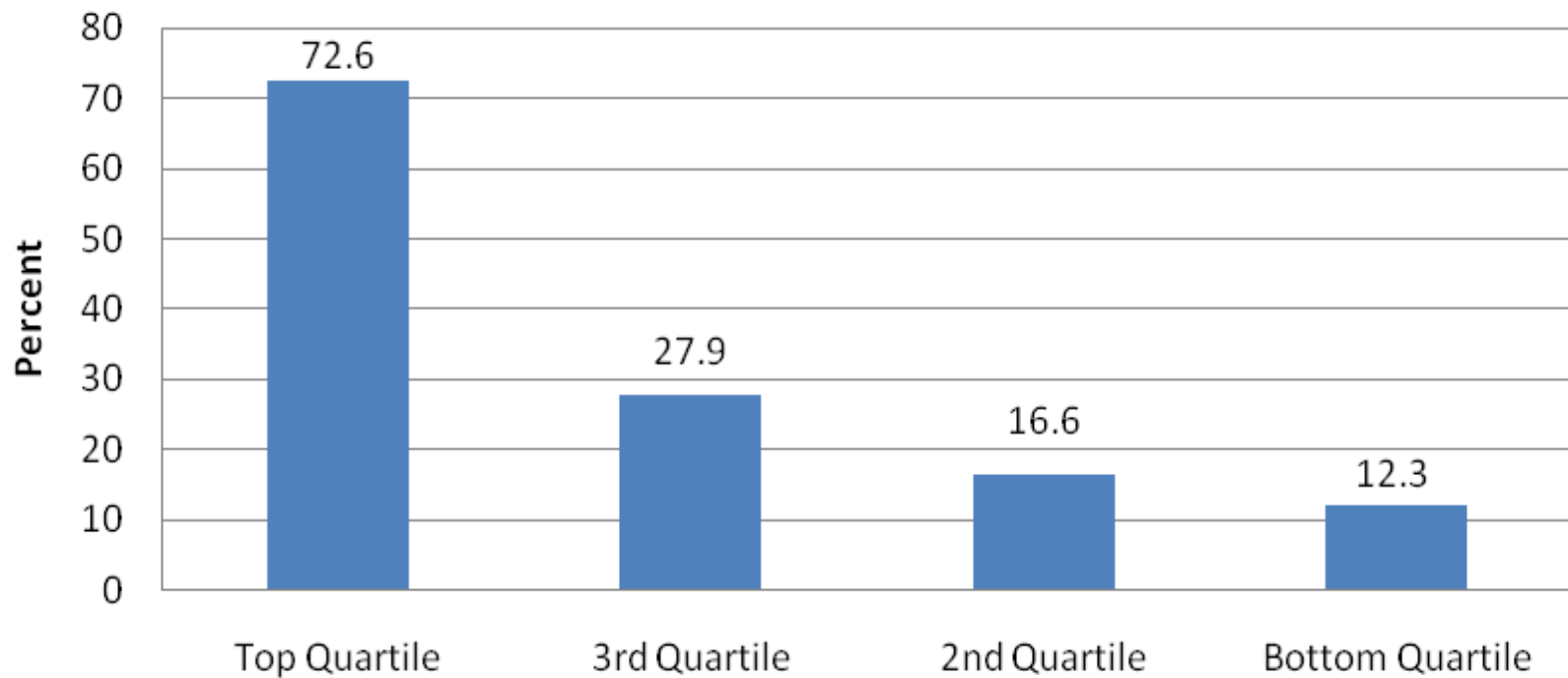
Financial Considerations the Most Common Reason for Leaving College



SOURCE: ELS:2002 "A First Look at the Initial Postsecondary Experiences of the High School Sophomore Class of 2002 (National Center for Education Statistics)

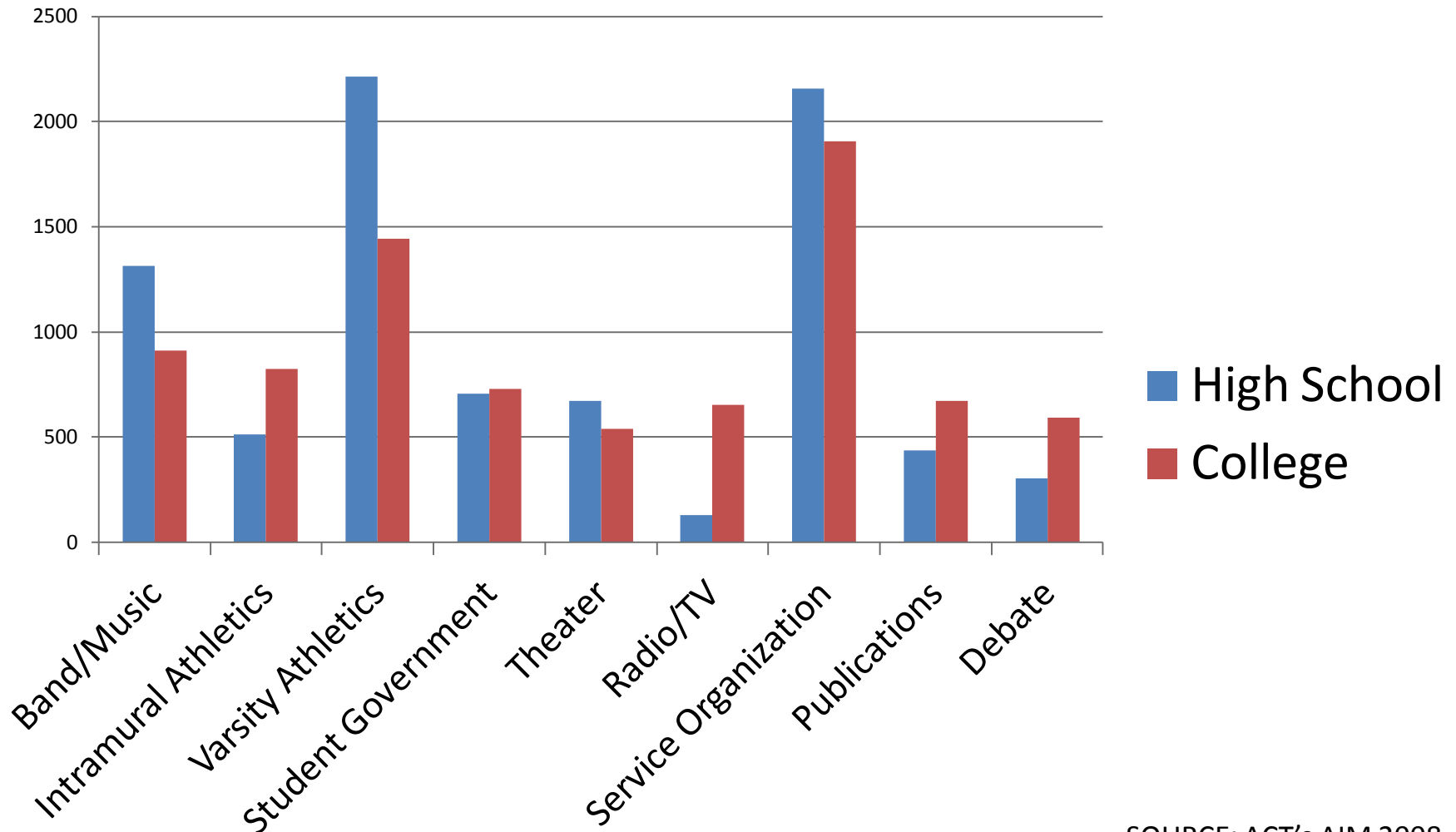
Income and Attainment

**Estimated Baccalaureate Degree Attainment by Age 24 by Family Income Quartile
2005**



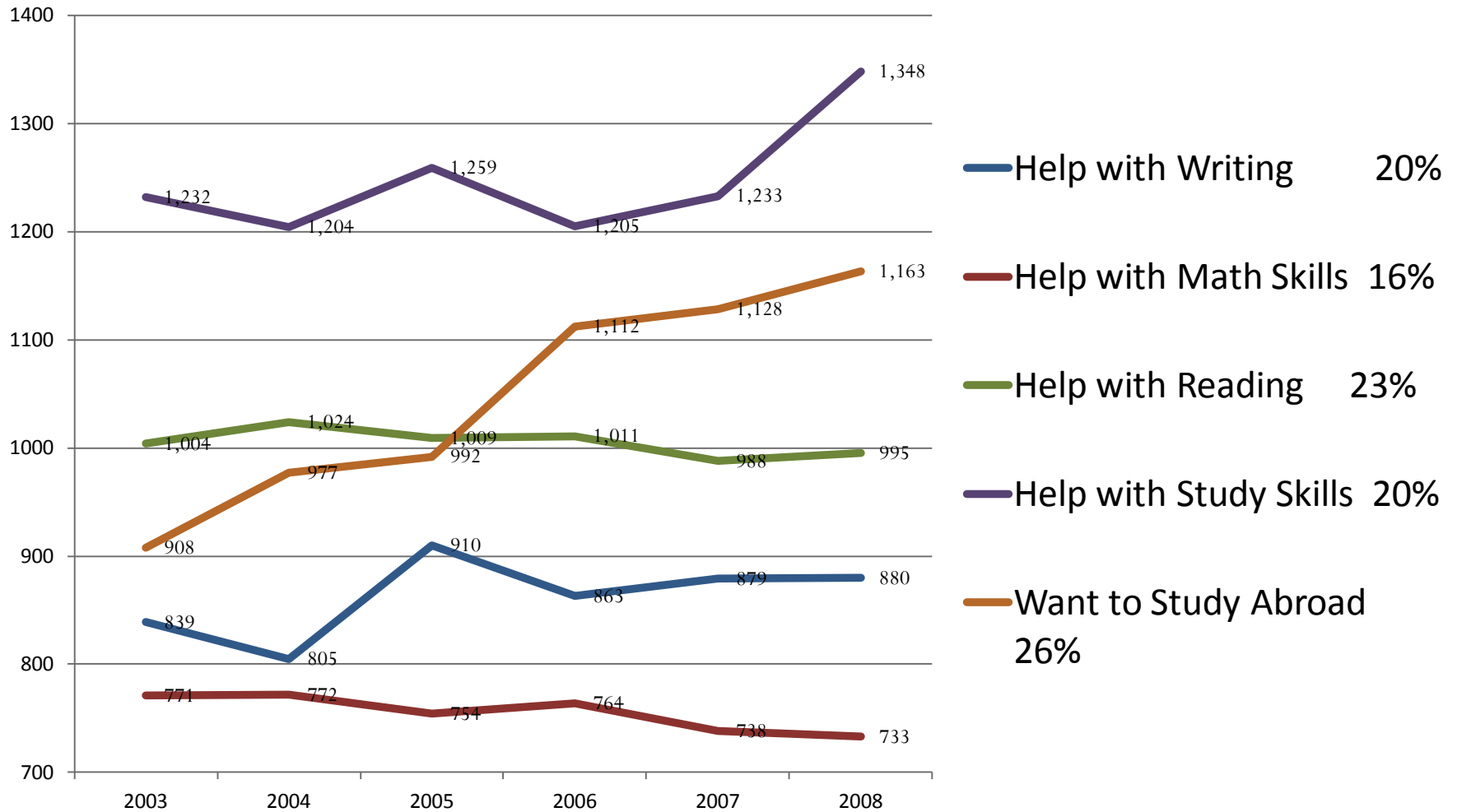
Postsecondary Educational Opportunity, 2006

Identifying Interests of Incoming Students: Ability to Scale Student Services



SOURCE: ACT's AIM 2008

Incoming Students' Self-Identified Needs



SOURCE: ACT's AIM 2008

Emerging Trends

1. Have an executive level leader, clear goals based on benchmarks and designated funding for improving retention
2. Build retention goals into the strategic plan and employee performance contracts
3. Have a standing executive committee to examine retention issues
4. Following-up with leaving students after the fourth week to reduce attrition rates and increasing the “stop-out” levels
5. Centralized unit to provide communications and support for students’ families.

4. Beef up Financial Aid Staff and Support

Redefining the role of the Financial Aid Counselor

Embracing Transparency of Total
Cost of Attendance

Importance of Financial Aid in College Choice

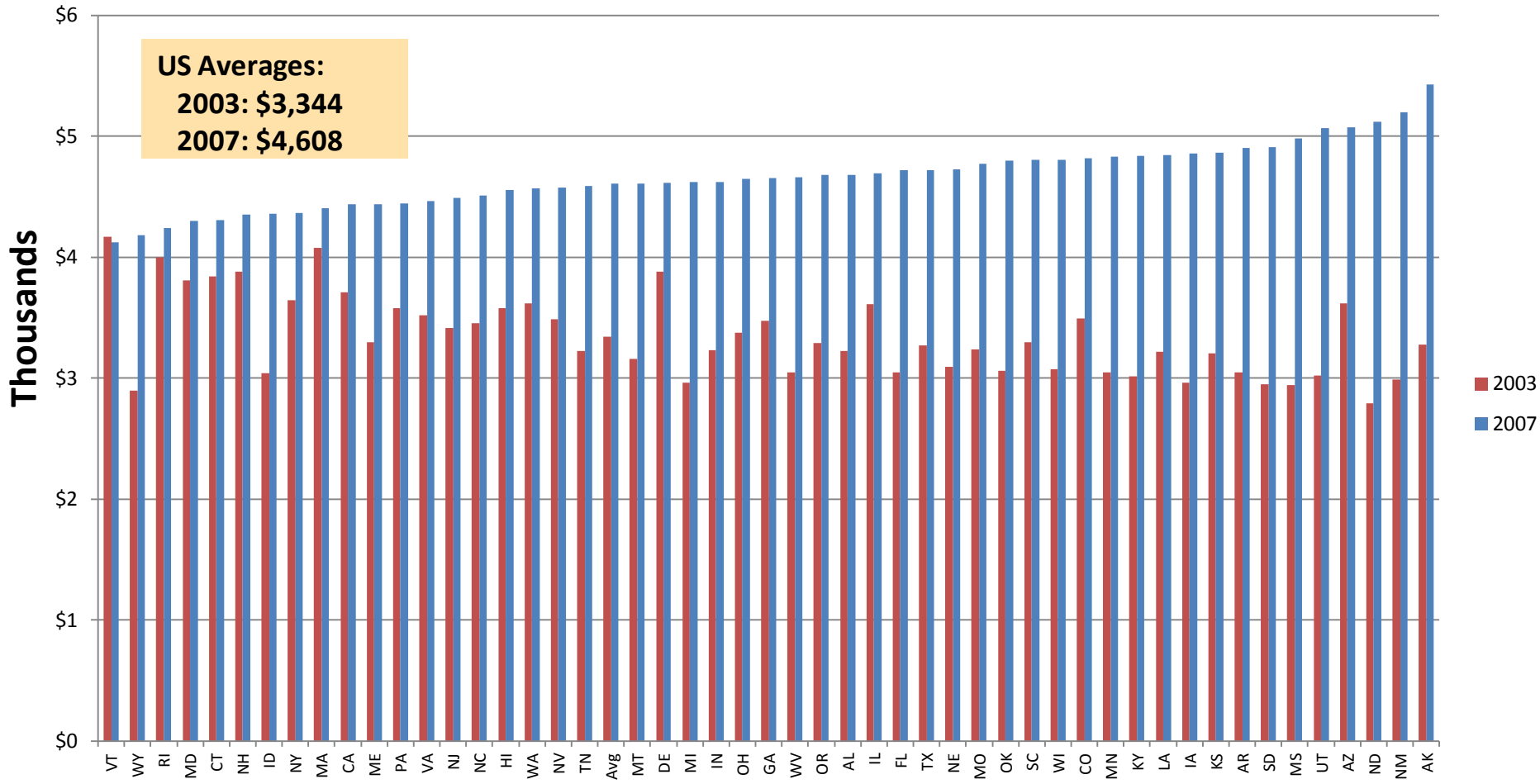
- 90% of prospective college students consider financial aid an important factor influencing their college choice.
- SOURCE: Education Dynamics 2010

Factors Most Noted in Choosing a College

- Majors & Career Programs Offered
- Location/ Campus Characteristics
- Cost/ Affordability
- Campus Size/ Safety
- Characteristics of Enrolled Students
- Selectivity

Average Student Borrowing is on the Rise

US Averages:
2003: \$3,344
2007: \$4,608



SOURCE: Measuring Up, 2004 and 2008 databases. Includes subsidized and unsubsidized Stafford and PLUS loans made to students and parents.

Percent of New Students for Whom Financing was a Major Concern

1992-93 to 2006-07

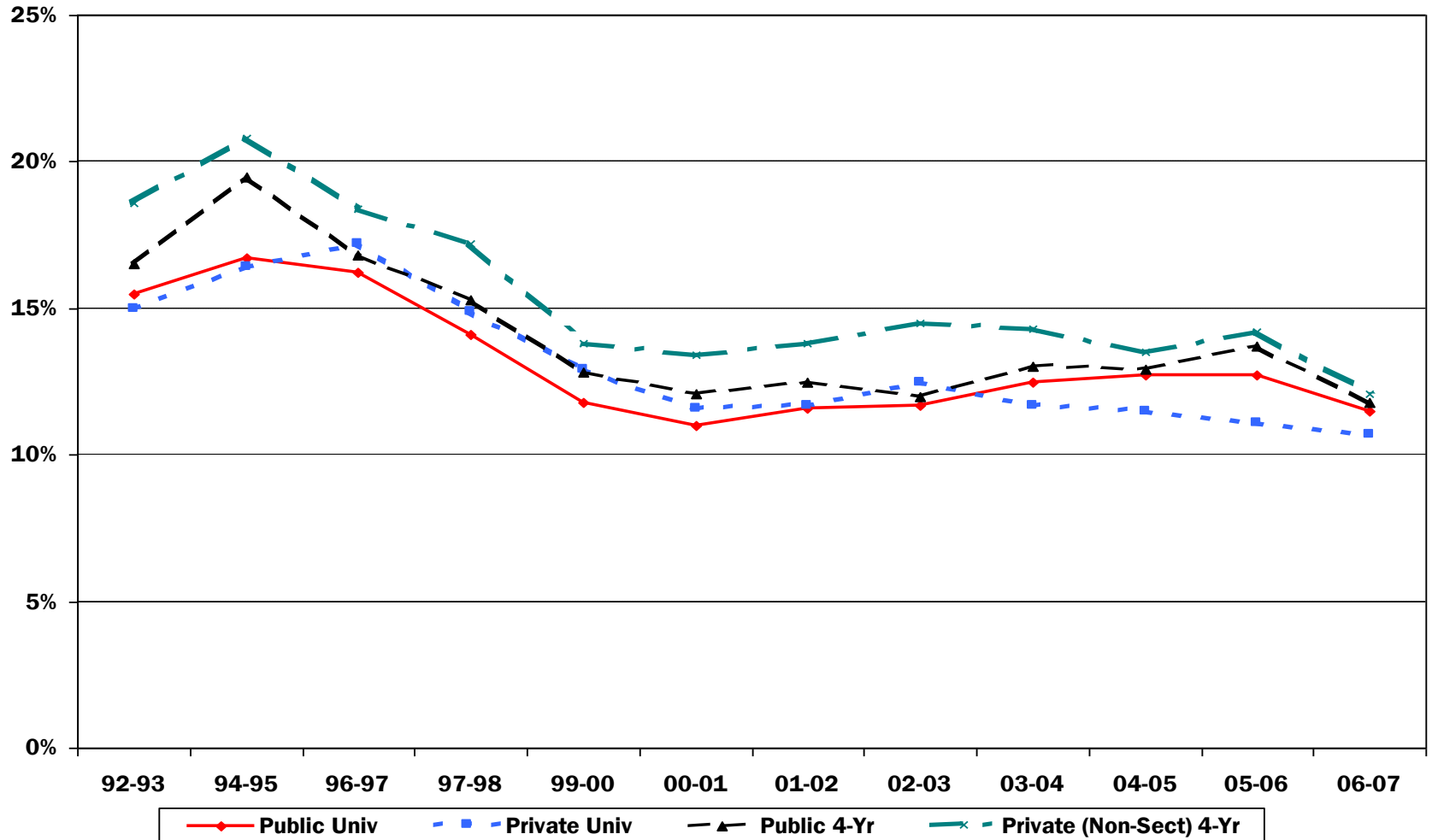


CHART SOURCE: CIRP & College Board, 2007

Emerging Trends

1. Expanded FA staff to handle large increases in aid request (FAFSAs) and Special Circumstance Appeals
2. Creation of Student Loan Specialist Positions
3. Dedicating 10% to 20% of fee Increases towards Need-Based Aid
4. Extended training for admissions / recruitment staff to counsel families on financial planning and options
5. Capital Campaigns Solely Focused on Raising Need-Based Aid

5. Support the New Majority: Transfer Students

A Transfer Student Friendly Programs
Align Institutions, Degrees and Processes

Emerging Trends

1. Designated staff to support transfer students
2. Advising staff training to properly place students with increasing amounts of transfer credit
3. Compartmentalizing Degrees - Moving beyond program to program articulation: creation of sets of associate degrees and UG certificates designed for transfer in different fields. These include general education and defined courses by learning objectives to meet major requirements

6. Pre K-20 planning and programs as a Fundamental Business Practice

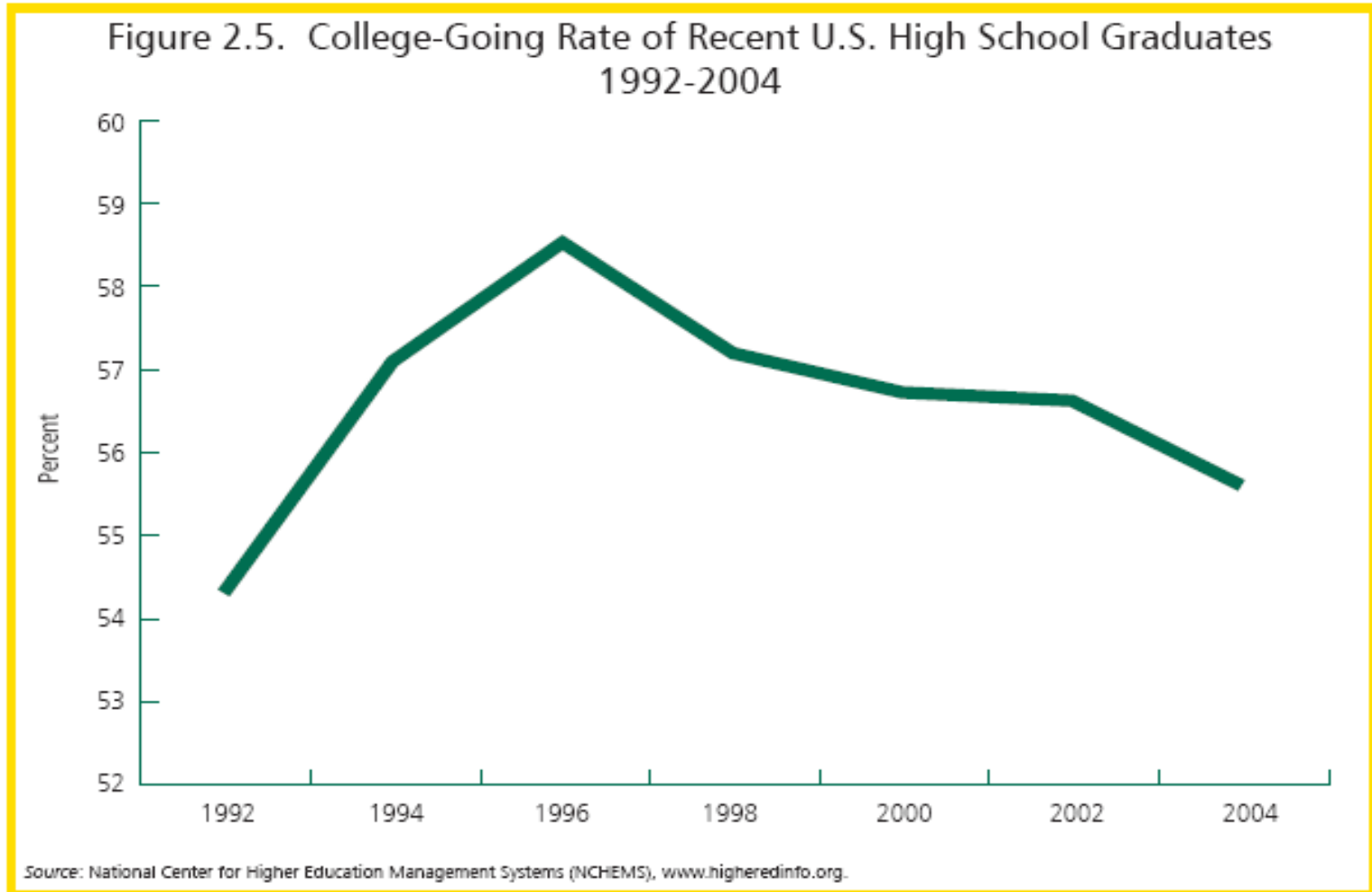
A Primary Key to Increasing the College
Going and Matriculation Rates

The Role of Parents & Communications

- 90% choose their child's colleges on the web
- 82 % plan to play a pivotal role in helping their children make the final decision about college
- **17% entrust their child to make that decision independently**

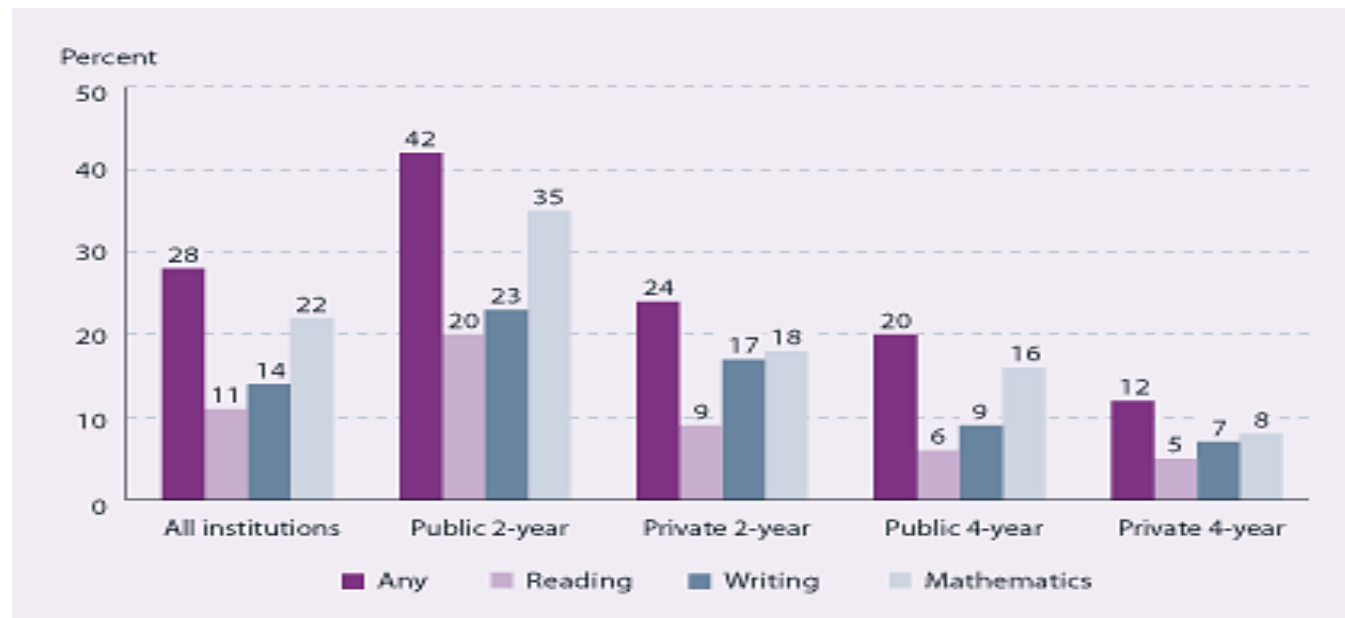
SOURCE: Circling Over enrolment: The E-Expectations of the Parents of College-Bound Students, 2009

Increasing the college going rate is key



More than 30% of College Freshmen Need Remedial Courses

PARTICIPATION IN REMEDIAL EDUCATION: Percentage of entering freshmen at degree-granting institutions who enrolled in remedial courses, by type of institution and subject area: Fall 2000



NOTE: Data reported for fall 2000 are based on Title IV degree-granting institutions that enrolled freshmen in 2000. The categories used for analyzing these data include public 2-year, private 2-year, public 4-year, and private 4-year institutions. Data from private not-for-profit and for-profit institutions are reported together because there are too few private for-profit institutions in the sample to report them separately. The estimates in this indicator differ from those in indicator 18 because the populations differ. This indicator deals with entering freshmen of all ages in 2000 while indicator 18 examines a cohort (1992 12th-graders who enrolled in postsecondary education).

Schools Need to Identify Current Programs that Address Traditional Transition Barriers

- 1.** Lack of Early Childhood Education
- 2.** Quality of Teacher Preparation
- 3.** Curriculum Alignment
- 4.** Culture of K-12 Education: Low Expectations
- 5.** Lack of Community and Industry Involvement in Schools
- 6.** Effective Use and Integration of Technology
- 7.** Proper Collection and Interpretation of Data
- 8.** Lack of Understanding College Readiness
- 9.** Proper Assessment Systems and Longitudinal Data
- 10.** Capacity and Quality of Educational Leadership
- 11.** Mental Health Issues
- 12.** Math and Science Education
- 13.** Literacy / Communication Skills
- 14.** Guidance Counseling
- 15.** Parental Involvement (Lack of)
- 16.** Money and Finances
- 17.** General Information on Colleges
- 18.** Lack of Role Models or Mentors
- 19.** Physical Health Related Issues

Emerging Trend for P-20 Strategies

1. Produce an **inventory** of initiatives and their outcomes related to pre-college pipeline efforts (pre-kindergarten through 12th grade) that help prepare students to succeed in college and their careers
2. Province-wide P-20 initiatives to improve college readiness and going rates
3. Outreach activities that emphasize reading

Summary Thoughts

“We are what we repeatedly do.

Excellence, therefore, is not an act
but a habit.”

-Aristotle

Focusing on SEM Basics

- It is all about working collaboratively to help more students succeed
- Embrace the Principles of Change Management
- Do not ignore the data – we must identify the problems first
- New tools will be needed for future success

Learn how to use your new hook(s)!



Keys to Thriving Enrolments in the New Economy

Jay W. Goff

Vice-President of Enrolment and Retention Management

Saint Louis University

St. Louis, Missouri, USA

314-977-8191

www.slu.edu

goffjw@slu.edu

AACRAO: <http://aacrao.org/>