CORE CONCEPTS OF ENROLLMENT MANAGEMENT

The Basics in Best Practices

Strategic Enrollment Management
Pre-Conference Meeting

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Presenters -

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Introductions –

Getting to know our audience...

- Public 4 YR institutions > 15,000 and < 15,000
- Private 4 YR institutions > 10,000 and < 10,000
- Smaller 4 YR private institutions less than 1500
- Technical – Art –
  - EM, Admissions, Registrar, Fin Aid, Acad Advis, Acad Services, Retention, Graduate, Career, Finance, Residence Life, Student Life, FACULTY, etc)

What is one thing that you would like to learn from this workshop?
Our Road Map: Core Concepts of Enrollment Management

- **Part I: Enrollment Management 101 – Conceptual Overview**
  - Creating Effective SEM Organizations

- **Part II: SEM Planning**
  - SEM Planning Processes

- **Part III: Best Practices Discussion**
  - Discussions on Best Practices for Implementation
  - SEM Self-Audit
The Handouts

- PowerPoint Slides with Full Print for Detailed Slides
- Institutional Examples
- SEM Audit
- Improving Student Learning & Success Doc
- Resources & Articles
- References
Enrollment Management Through the Academic Lens

THE THEORY
CONCEPTS and GOALS -- What’s Behind SEM?

**Concept:**
Determining, achieving, maintaining optimum enrollment

- **Goal:** Stabilize enrollment
- **Concept:** Better student access, transition, and persistence

- **Goal:** Reduce vulnerability to environment
- **Concept:** Supporting the delivery of effective academic programs

- **Goal:** Link academic programs and SEM
**Concept:** Generating additional net revenue  
- **Goal:** Stabilize finances

**Concept:** Enabling effective financial planning  
- **Goal:** Optimize resources

**Concept:** Increasing process and organizational efficiency  
- **Goal:** Improve quality
**Concept:** Improving service levels to all stakeholders  
- **Goal:** Improve services

**Concept:** Creating data-rich environment  
- **Goal:** Evaluate strategies and tactics

**Concept:** Building linkages with functions across campus  
- **Goal:** Improve access to information
What SEM Is Not

- Not a quick fix
- Not all about structure
- Not glorified admissions and marketing
- Not function that operates separately from academic mission of the institution
Applying the Academic Lens

REFOCUSING ENROLLMENT MANAGEMENT
Concentration on Structure

- Bringing offices together to accomplish a more purposeful approach to enrollment
- Maguire’s “Grand design” to bring independent offices into common purpose
- “I had them report to you because I didn’t want them reporting to me”
- Building a structure for structure in Cincinnati
SEM evaluation at University of Cincinnati

EM offices in Student Affairs; structure chaired by Student Affairs administrators

Seen by campus as Student Affairs

Structured to include Provost, Research VP, Faculty Senate Chair, Chair of Deans
Perception is Reality

- A **member** doesn’t feel accountable

- Make academic administrators and faculty feel **responsible** for SEM

- Shared governance led to co-chairs

- Results: more engaged Provost for enrollment policy; more serious enrollment discussions with involvement of vice provost with deans
"I would never work in an institution where EM was in student affairs."

- Development of the EM division as the principle structure
- VP at private institutions
- Associate VP at publics
- Bringing together the enrollment units
Structure v. Academics

- Academic Affairs/Student Affairs debate misses the point

- *Placement* of a structure is not as important as its *connection* with academics

- EM will not succeed unless it is part of the academic fabric of the institution
When structure gets in the way, an academically centered institution will look for other paths besides structural change.

Faculty view is consensus building and collaboration.

Why change structure if another way is found?

Reaching the goal is the key, not the structure.
Taking The Easy Road

- Structure gives a sense of false reality

- Steering committees, planning groups, working groups become the embodiment of SEM

- Easier to concentrate on structure than to deal with the really hard work of staying in touch with the academic context
STRATEGIC Enrollment Management

- Comprehensive process

- Achieving and maintaining optimal recruitment, retention, and graduation rates

- *Optimum defined in academic context*

- Institution-wide process that touches every aspect of institutional function and culture

- Academics are an umbrella concept

M. Dolence, 1993
The EM Ethos is the underlying character and spirit of an institution’s academic culture.

- The Ethos puts the EM emphasis back on the academic culture.
- Makes structure the servant, not the master, of enrollment policy and strategy.
- The academic lens touches every aspect of institutional culture and function.
Guiding Principles for the SEM ETHOS

- Shared responsibility
- Integrated institutional planning
- Focus on service
- KPIs
- Research and evaluation
- EM for the long haul
The SEM Template

- Academic Leadership
- Lateral communication
- Structures for participation
- Matching structure to mission
As a professional literature, Enrollment Management emerged in the 1980s.

As a professional practice, Enrollment Management evolved in the mid-1990s.

In the new millennium, Enrollment Management will evolve as a strategic component of institutional planning....
Enrollment Management is just now coming of age….

Over the first 10 years of the new millennium, what is Enrollment Management being marked by the increased emphasis on ???

- Programs and services designed with intentionality, purpose, integration of effort, service efficiency, and positive interventions with students.
- Integrated cross-campus collaborations and partnerships between faculty, administrators, and staff.
- Use of assessment and information-driven decision making.
- Understanding how campus cultures impact enrollment management efforts.
- Importance of shared leadership at multiple levels.
Consider Elements of Campus Culture

Unpacking Campus Culture

- Pervasive attitude to not be content to rest on past success.
- Sense of inclusiveness on the part of all members of the campus community frequently characterized as a “family.”
- A strongly held sense of mission that recognizes the campus as “distinctive” or “special.” “The people are special.”

A Matter of Culture and Leadership: Student Success in State Colleges and Universities, AASCU, 2005
Knowing Your Mission
Establishing Goals
Setting a Direction & a Focus

Start Here

Starting your life at The Rock can be a nerve-wracking experience. What do I bring? What will my roommate be like? Admit it—you’re excited, but probably a little nervous, too.

Well, guess what? Thousands and thousands of students have come here since our first class back in 1889 and each faced a different set of challenges. (And they might not admit it, but many of your professors probably had a few butterflies during THEIR first days here, too.)
Strategic enrollment management is a concept and process that enables the fulfillment of institutional mission and students’ educational goals.

**Concept and process**

* programs * set of activities * structure * strategies*
Enrollment management is a institutional balancing act.

- Enrollment Goals
- Quest for Quality
- Increase Diversity
- Ensuring Access and Affordability
- Increasing Net Tuition Revenue
- Increasing Retention & Graduation Rates
- Improving Student Learning Outcomes
- Improving Student Involvement and Engagement

What else do we strive to balance as part of a SEM??
What Impacts the EM Environment?

- Demographic shifts
- Changing economics of higher education
- The public policy and the legal environment
- The changing competition
- The “Information Age”
- The “Communication Age”

What other factors impact the EM environment???
The Purposes of SEM are Achieved by…

1. Establishing clear goals and planning efforts for the optimal enrollment (number and types of students) needed to fulfill the institutional mission

2. Promoting students’ academic success by improving access, transition, persistence, and graduation

3. Promoting institutional success by enabling effective strategic and financial planning
The Purposes of SEM are Achieved by…

4. Creating a data-rich environment to inform decisions and evaluate strategies

5. Improving process, organizational and financial efficiency and outcomes

6. Strengthening communications and collaboration among departments across the campus to support the enrollment program
What SEM is Not….

- A quick fix
- Solely an organizational structure
- An enhanced admission and marketing operation
- A financial drain on the institutional budget
- An administrative function separate from the academic mission of the institution
SEM is a Journey

- SEM requires systems thinking
- SEM requires strategic thinking
- SEM is resource hungry and it is all about ROI
- SEM is growth by substitution (can’t do it unless you take something away)
- SEM Math (2 + 3 = 7)
A comprehensive approach to integrating all of the university’s programs, practices, policies, and planning related to achieving the optimal recruitment, retention, and graduation of students...
Enrollment management becomes…

...**strategic** enrollment management when it actively **integrates** planning and strategies in the formal enrollment management units...with the institution’s strategic planning, its academic vision and its fundamental mission.
Primary Ways to Maintain, Increase, or Shape Enrollment

- Increase and/or improve the inquiry pool
- Improve conversion rate (inquiry to application) – Relationship Building
- Offer admission to a greater number of students and/or higher achieving students - Scholarships
- Improve yield rate (admit/offers to deposit/enrollment) – Relationships and Marketing
- Improve scholarship opportunities and aid
- Consider academic program mix
- Improve marketing strategies – Segment Marketing Strategies
- Improve student learning and success
- Improve student involvement and engagement
- Improve academic support programs
- Improve facilities (academic, social, and living environment)
SEM requires the integration of 3 SEM components:

- Enrollment Management as an administrative effort.
- Enrollment Management as a planning process.
- Enrollment management as a leadership effort.
Focuses on the management and administration of those departments and functions formally charged with achieving the institution’s enrollment goals.

SEM decision focus on optimal resource allocation to achieve enrollment goals
- Marketing and recruitment priorities
- Need-based versus merit-based FA packaging
- Course offerings and scheduling
- Service efficiency – One-Stop
- Processing of academic policy
- Student intervention initiatives

In what other ways might we interpret the administrative effort of SEM???
Planning Process of SEM

- Focuses on the outward- and forward-looking activities that guide the institution’s pursuit of its preferred future in a constantly changing and competitive environment.

- Focuses on long-range planning and institution-wide strategy development:
  - New curricula & academic programs
  - Facilities development and renovation
  - Marketing and image campaigns
  - Investments in technology
  - Pricing decisions
  - Retention planning programs (early alert interventions, first year seminar, learning communities, support services, academic advising, etc.)

In what other ways might we interpret the planning effort of SEM???
Leadership Model of SEM

Focuses on leadership as a shared responsibility—occurring at all levels and deeply embedded in the way the institution works as an organization on a day-to-day basis.

- No Silos
- Enabling Leadership at Multiple Levels
- Servant Leadership

Engender trust from those they must lead
Communicate a sense of purpose
Motivate people to set goals, develop strategies, and a means of assessment.
Leaders can...

- help to develop a constant spirit of healthy restlessness to become even better at what they do.
- create an environment rich with experimentation.
- set high expectations that can be met, provide support and example to meet them, then raise the bar another notch.
- foster cultures of student success experiences deliberately through consistent actions and visible allocations of scarce resources.
SEM, as an administrative effort, planning process, and leadership model…

- requires an understanding of the complex dynamics that shape the university’s enrollment profile.

- integrating the 3 Faces of SEM requires that we focus not on individual functions and departments but on the entire enrollment process.
We would be inattentive if we didn’t introduce the enrollment funnel in our planning effort…..but, it does not provide sufficient attention to “continuing” students’ experience.
Continued Cultivation

ACTIONS

Continuing Students
- Alumni
- Graduates
- Enrollees
- Depositors
- Applicants
- Inquiries
- Prospects

Specific

General
Moving from the traditional enrollment management perspective....
Turning the enrollment funnel on its side.....to express progression forward....and emphasize the multi-dimensional processes that exist.
...to a fully integrated strategic enrollment management perspective.

The SEM Perspective

Recruitment / Marketing
Orientation
Classroom experience
Co-curricular support
Degree/goal attainment

Student’s Experiences
Admission
Financial support
Academic support
Retention
Alumni

The Degree that Makes the Difference
umd.umich.edu
“An institution’s academic program is inexorably co-dependent on enrollment management. The quality of the academic program can only be developed and maintained in a stable environment, and stable enrollments are only possible through sound planning...”
Premise:

- Simply finding “best practices” somewhere and “plugging them in” is unlikely to be effective.

- Overall campus culture within which these practices are deployed and the quality of presidential and administrative leadership that keep them moving and coordinated.

Look for ways to create a campus attitude and climate that is consistently focused on meeting student needs and helping students succeed.
Many different elements must come together in a coordinated way for SEM planning to be effective.

None is more important than developing leadership at multiple levels of the institution and encouraging partnerships across departments and divisions.
Determine your niche, focus on it, and deliver on it as well as you possibly can . . .
The Concept of Optimum Enrollment

Institutional Mission

- Academic profile
- Majors
- Physical capacity
- Special Skills
- Ethnicity
- Undergraduate and/or Graduate
- Program capacity
- Residency
All may want **better** students
- Administration may want **more** students
- Faculty usually want **fewer** students
- Departments may be **reducing** capacity
- **Access vs. Quality**
Important Reminders

SEM is...
- Mission and niche based
- Subject to organizational history
- Dependent on expertise of available staff
- About collaboration, not org charts
...Different institutions will organize for SEM in different ways...
4 Structural Approaches

*The Enrollment Management...*

- Committee
- Coordinator
- Matrix
- Division

Kemerer, Baldridge, and Green
Coordinator Model

- Academic Affairs
- Information Systems
- SEM Coordinator
- Student Affairs
- Administrative Operations
How is your institution approaching enrollment management?

- Committee ???
- Coordinator ???
- Matrix ???
- Division ???

Kemerer, Baldridge, and Green
SEM Organizational Effectiveness Scale

**Structural type**
- Committee
- Coordinator
- Matrix
- Division

**Commitment to change**
- Lower
- Higher

**Expertise of Lead EM staff**
- Less
- More

**Enrollment results**
- Weaker
- Stronger
Composition of SEM Organizations (Conceptual, not definitive)

**BASIC**

- Admissions
- Financial Aid
- Orientation
- Registrar
- Enrollment Research
- Retention
Composition of SEM Organizations

**BASIC**
- Admissions
- Financial Aid
- Orientation
- Registrar
- Enrollment
- Research
- Retention

**EXPANDED**
- Pre-College Programs
- Academic Support Programs
- Academic Advising
- Career Services
Composition of SEM Organizations

**BASIC**
- Admissions
- Financial Aid
- Orientation
- Registrar
- Enrollment
- Research
- Retention

**EXPANDED**
- Pre-College Programs
- Academic Support Programs
- Academic Advising
- Career Services

**COMPREHENSIVE**
- Institutional Research
- Marketing
- Community Relations
- Alumni Relations
SEM Transition Model: Denial

Enrollment Trend: Down

Institutional Messages

- “The downturn is temporary.”
- “It’s just (pick one) demographics/the economy/our competitors.”
- “We are subject to forces beyond our control.”

Institutional Action

- Form a committee
- Discuss options
SEM Transition Model: Nominal

- **Enrollment Trend:** Down

- **Institutional Messages**
  - "We have to do something."
  - "We need a ‘silver bullet’ recruiting/marketing strategy."

- **Institutional Action**
  - EM is a new name for admissions
  - Fund ad hoc, short-term strategies lacking enrollment management expertise
  - More discussion
SEM Transition Model: Structural

Enrollment Trend: Variable

Institutional Message

“This isn’t as easy as we thought.”

Institutional Action

- Limited restructuring: EM committee or other organizational structure
- EM begins to integrate enrollment-related activities
- EM focuses inward on improving effectiveness, efficiency, & integration
- EM keeps hands off the academic enterprise
- Continue with short-term strategies with minimal enrollment management expertise
- CI improvement process – Not retention
SEM Transition Model: Tactical

- **Enrollment Trend:** Building to optimum enrollments

- **Institutional Message**
  - "To achieve optimum enrollments will require fundamental changes."

- **Institutional Action**
  - Substantive restructuring: EM begins to look outward & forward
  - EM begins to redesign processes & functions
  - EM drives revenue planning (not revenue planning driving SEM)
  - EM embraced as a comprehensive process
  - EM “holds hands” with academic enterprise
  - EM goals are adopted
  - Strategic planning based on reliable data
  - Strong enrollment management expertise
  - Targeted funding
SEM Transition Model: Strategic

Enrollment Trend: Achieving optimum enrollments

Institutional Message

- "We control our enrollment outcomes."

Institutional Action

- Stable organizational structure and funding
- Top-level EM leadership
- Alignment ahead of the changing environment
- EM integrates institutional decision-making process
- EM is fused with academic enterprise
- EM embedded in institutional planning
- Consistent planning and assessment cycle
SEM Transitions

SEM Structures

Strategic
Tactical
Structural
Nominal
Denial

Division
Matrix
Coordinator
Committee
Where is your Institution?
Moving Toward a SEM Plan

Premise:

An institution can become more strategic through the formalization of a plan that is dynamic and fluid and embodies the institution’s vision, mission, values, and culture.

Belief:

*Improvement in enrollment conditions are a by-product of institutional intentionality, integration of effort, information driven decision-making, leadership across multiple levels of the institution, and campus culture.*
SRU Enrollment History Before Strategic Enrollment Planning


Enrollment: 6600, 6800, 7000, 7200, 7400, 7600, 7800, 8000

The chart shows a decreasing trend in SRU enrollment from 1991 to 1999.
Headcount (15th Day comparisons)

15th Day Status – 8,458 (1.60%/133 ▲)
24.33% increase since 1999
First to Second Year Retention Rates
Results

- Improved Quality
- Increased Diversity
- Increased Academic Program Interest
- Increased Out-of-State students
- Increased Regional Enrollments
- Increased Retention
- Increased Transfers (all levels/all institution types)
- Increased Transfer Institution Collaborations
- Increased Graduation
- Improved Program Attendance and Service Usage
- Improved Student Involvement and Engagement
Three Critical Observations Made in 1999

1. No single factor caused our enrollment decline and no single act would change the trend.

2. We had to move from “enrollment by chance” to “enrollment by design”.

3. Strategic enrollment planning had to become part of the culture of the entire campus.
Why Planning???

Not fully in control of our destinies, but we can use knowledge of our environments to maximize control of our outcomes.

Demography does not define destiny.
Look for strategies which could provide immediate success.

We couldn’t wait until we created the “perfect” plan. We decided to implement and evaluate specific strategic services, programs, and activities designed to bring success in recruiting new students and retaining our continuing students.

It is tempting for strategic planners to move quickly at a “tactical level” to “write the plan” themselves.

An institutional understanding of strategic issues and a systems approach to achieving objectives create a “synergy” that fosters success.
What is a Strategic Enrollment Plan?

- **Institutional Planning:**
  - “a dynamic means of describing the organization, its goals, gaps to achieving them, and ways to overcome the gaps for long-term viable success” (Stryker, 1997).

- **Enrollment Planning:**
  - “the process of developing and maintaining a strategic fit between the institution’s goals and capabilities and its changing market” (Kotler and Fox, 1985).

There is a strong relationship between the institutional strategic plan and the strategic enrollment plan. The SEM plan operationalizes the institution-wide strategic plan.
Elements…

- Begins with a clearly defined vision as it relates to institutional mission;
- Performs an internal and external environmental analysis and forecasts future trends;
- Recognizes and articulates current position and direction;
- Acknowledges problems and constraints as well as opportunities and strengths;
- Outlines objectives and desired outcomes and articulates strategies to achieve them;
- Determines a budget to achieve each outcome;
- Assigns responsibility for strategies to specific individuals;
- Sets forth an evaluation mechanism to measure progress and redirect efforts if necessary
The Strategic Enrollment Management (SEM) Plan presented here represents the collaborative initiatives, communications, energies and efforts of the Enrollment Services personnel as well as many constituencies across campus. The plan is presented in the form of a PowerPoint presentation to represent its dynamic and fluid process. Every effort was made to avoid creating a plan that would be simply prepared, written, and placed on a shelf to collect dust. The plan was prepared as a PowerPoint presentation to represent its changing nature as new assessments are examined and responded to the environment, necessitating changes to the plan. Many sections of the plan can be separated apart from the full document for presentation purposes.

The SEM plan is comprised of ten (10) sections.

**Presentation 1**
- Section I: Vision, Mission, and Values

**Presentation 2**
- Section II: Institutional PN Goals and Five Year Projections
  - Subsection A: Strategic Enrollment Management Planning 2009 to 2012

**Presentation 3**
- Section III: Environmental Scan Overview

**Presentation 4**
- Section IV: Enrollment Conditions for SEM

**Presentation 5**
- Section V: US NEWS & GERDE - National Comparative Data

**Presentation 6**
- Section VI: Demographics of Pennsylvania

**Presentation 7**
- Section VII: Historical and Current Enrollment Status

**Presentation 8**
- Section VIII: Eight Year Enrollment Patterns

**Presentation 9**
- Section IX: Enrollment Services Undergraduate and Graduate Recruitment Initiatives

**Presentation 10**
- Section X: Institutional & Enrollment Services Division Goals, Activities, Services & Assessments
Four Guiding Planning Principles

- Comprehensive approach To changes
- Tracks relentlessly what works & what doesn’t
- Strategic Enrollment Planning
- Builds from within the campus culture
- Works to get everyone on the same page
Considerations for Planning

- Changing environments
- Internal realities
- External pressures

Planning

- Thoughtful planning
- Systems Thinking
- Careful Analysis
- Proactive & Purposeful Action
Impact of Strategic Enrollment Planning on Institutional Planning

- **Resources**
  - Impact on net tuition, credit hour generation, headcount allocations

- **Culture of the Institution**

**Clear and realistic enrollment goals**
- Internalized
- Supported
- Achievable
- Measurable
Development of a SEM Plan

SEM planning is a comprehensive process that has implications for the entire organization.

SEM planning initiatives will have a far-reaching impact on the rest of the institution.

SEM planners need to move from the more general strategic plan action items to specific goals and targets directly related to enrollment management.

However, some institutions initiating SEM Plans have no formal structure or authority to implement institution-wide reform.

Plan......Implement......Assess.....
5 Keys to Effective Strategic Enrollment Planning

- Focus of the plan is on subsequent implementation.
- The plan allows for ordered responses to better handle uncertain/turbulent environments.
- The planning process stimulates continual organizational questioning toward meeting existing or new challenges.
- Planning elements become intertwined so synergistic outcomes can be achieved.
- The planning process ensures that various stakeholder provide frequent input/feedback.
Components of a SEM Plan

- GAP Analysis
- SWOT Analysis
- Environmental Scan
- Current and Future Demographics
- Operational Analysis Strategies
- Research and Data-Driven Decision Making
- Values
- Vision & Mission
- Goals Objectives Strategies

Planning Process
Comprehensive Planning

- Develop an Effective Planning Effort
  - The plan should
    - Be a working action document
    - Used virtually every day
    - Accessed frequently
    - Available to all
    - Dynamic and fluid in nature
    - Modified regularly
Who Plans???

- Enrollment Management Organizational Structures
  - Division
  - Task Force
  - Committee

Who Plans???
- Admissions Units
- Student Financial Assistance
- Academic Records & Summer School
- Student Information Systems
- Institutional Research
- Faculty
- Public Relations
- Orientation
- Academic Advising & Placement
- Academic Services
- Student Development Unit
- Deans
- Administration (Finance, Academics, Student Life)
- Academic Policy Unit
- Residential Life
- Alumni Relations
- Information Technology
- Facilities
- Students
Types of Strategic Enrollment Plans

Annual or Bi-annual plan should not be confused with longer term enrollment strategic planning. Different in timeframe, scope, and purpose

**Longer Term Enrollment Plan**
- Driven by overall college/university strategic plan – where does the institution hope it will be in 5 years?
- Performed less frequently
- Focuses on fundamental decisions and actions that shape the long-range nature and direction of the institution
- Less detailed and broader in scope and purpose
- More of an abstract in terms of goals/objectives
- Much more emphasis is placed on product and marketing strategies

**Annual Plan**
- Concerned with the ‘here and now’
- Performed annually
- Focuses on goals, objectives, strategies and measures that shape the immediate state of enrollment
- More detailed and focused in scope and purpose
- Dynamic and fluid in nature
Considerations for Building a Comprehensive Enrollment Planning

Institutional Strategic Plan

Long Term Enrollment Plan 3-5 years

Annual Recruitment Plan

Annual Retention Plan

Clear Goals Key Strategies Action Plans

Marketing/Recruitment Clear Goals Key Strategies & Action Plans Assessment & Evaluation

Retention Clear Goals Key Strategies & Action Plans Assessment & Evaluation
Questions for Consideration in a Longer-Term Enrollment Plan

- What is our purpose?
- Where do we want to be 3, 5, 7, 10 years from now?
- Where are we now? How do we know?
- What assumptions are we making? How do we know?
- What do we hope to accomplish?
- What gaps do we find between the current and desired situations?
- Which courses of actions must we take to close the gaps?
- How well are the goals being met?
- What unexpected occurrences might happen and how well we handle them?
- How will the organization members organize, interface, and cope with change in the planning cycle?
Considerations for the Desired Enrollment State Over the Next 3-5 Years

Defining Your Desired Enrollment State:
- Size
- First Year / Transfer / Graduate
- Traditional / Non-Traditional
- Full Time / Part Time
- Academic Profile
- Financial Profile
- Residential / Commuter
- Geographic Representation
- Major Distribution
- Co-Curricular Interest
- Gender and Ethnicity

How does your institution want to build and shape the student body? What influences impact the shape of your student body?
Strategic Enrollment Planning – Student Learning & Success

Elements...

- Begins with a clearly defined vision as it relates to institutional mission;
- Performs an internal and external environmental analysis and forecasts future trends;
- Recognizes and articulates current position and direction;
- Acknowledges problems and constraints as well as opportunities and strengths;
- Outlines objectives and desired outcomes and articulates strategies to achieve them;
- Determines a budget to achieve each outcome;
- Assigns responsibility for strategies to specific individuals;
- Sets forth an evaluation mechanism to measure progress and redirect efforts if necessary.
Comprehensive Annual Strategic Enrollment Plan

- Very Specific Enrollment Goals
- Well-Conceived Supporting Strategies and Tactics
- A Plan that is a Working Action Document
  - Used virtually every day
  - Accessed frequently
  - Dynamic and fluid in nature
  - Modified regularly
The “Vision Thing” – Mission and Direction

A Direct Outgrowth of the Institution’s Vision and Mission

Without the vision, the plan cannot be strategic.

SEM plans begin with institution’s vision and mission.

- **Vision**
  - sets the institution in a direction for the future
  - reflects the values and philosophy and future aspirations
  - motivates faculty and staff
  - provides a sense of purpose
  - serves as an announcement of high-level goals

- **Mission**
  - clarifies an institution’s purpose and “vision” as articulating what an institution should look like in the future as it fulfills its mission.
Meaningfulness of a Vision Statement

The following is the vision statement for Slippery Rock University. The vision statement for the university is used as a foundation for the development of Enrollment Services’ vision statement.

Institutional Vision Statement:

_**Slippery Rock University will excel as a caring community of lifelong learners connecting to the world.**_

Enrollment Services Vision Statement:

_The Division of Enrollment Services will strive to operate interdependently with others, sharing information of value to the institution as a whole, and working with our colleagues to achieve a cohesive, supportive, network for students from the time of their first inquiry through graduation and beyond._

Each member of the Enrollment Services team will strive to work creatively, enthusiastically, and diligently to attain market prominence, achieve optimal enrollments through progressive recruitment and retention efforts, support the vision and the academic mission of the University, and enhance student learning and success.

Team-initiated division and university-wide programming efforts and information management are vital to the achievement of these goals. Through shared learning experiences and a genuine commitment to teamwork, the Division of Enrollment Services will exert a positive influence to optimize the match between potential learners and the values, vision, and competencies of Slippery Rock University.
Enrollment Services’ mission is to use a systematic set of activities and programming efforts to coordinate student recruitment and retention enrollment management initiatives for Slippery Rock University.

These activities include providing consistent and clear articulation of the institution’s vision and mission, strategic recruitment approaches, comprehensive financial aid counseling, and comprehensive first year transition experiences which promote student learning and success and are responsive to student interests and needs.

Professional development opportunities for staff and faculty are also included.
Meaningfulness of Core Values

The core values of the Enrollment Services Division provide the conceptual underpinnings for our day-to-day operations as well as our interactions with people. Our core values are as follows:

**Put STUDENTS first.** This philosophy means that whenever possible, decisions will be made and actions taken that are in the best interest of students and what matters most in achieving student success and learning in the context of a higher institutional environment. Student learning and success will drive policies, practices, system procedures and the messages of each communication. We will strive in our programming and services to consider what “matters most” in achieving student learning and success.

**Put all levels of staff next.** Students will never be first if all levels of our staff are not closely behind. Each university staff member needs to be valued for the diverse contributions they make to Enrollment Services, Slippery Rock University, and especially in the lives of our students.

**Under promise and always strive to OVER-deliver.** We should look for every opportunity to EXCEED the expectations of those we serve, always striving to deliver more than we promise. It is important for us to be certain that we are delivering what we promise. Quantitative and qualitative assessments will lead us to improve our efforts.

**Have a purpose for everything we do and execute well.** Clearly define the purpose of everything we undertake as well as the desired outcome. Assess and measure the effectiveness of all initiatives and eliminate, refine, or replace less effective strategies. Do only those things that we can do at an exemplary level of quality.
Key Performance Indicators:

- **KPI** – a measure of an essential outcome of a particular organizational performance activity or an import indicator of the well-being of an organization.
  - Measurement –
    - Do you have the information or can you get it?
  - Operational Definition –
    - What precisely do you mean?
  - Current Value or Baseline –
    - If information is available, where are you now?
  - Priority –
    - How important is this KPI compared to the others?
Strategic Planning

SWOT Analysis
- Internal SW
- External OT

Tactical Plans and Contact Plans

KPIs
- Market Position

Secondary KPIs

Trend Analysis
- Demographics
- Pricing

Environmental Scan
- Political
- Economic
- Societal
- Technological

"Measuring Progress"
Assessing the Environment

- Analysis of the external and internal environments
  - Understanding the strengths and weaknesses in light of the opportunities and threats its faces
  - Environmental analyses are never complete

**SWOT**

- What major external or future opportunities do you have?
  - Current Increase in HS Grads
- What major external or future threats do we face?
  - Declining HS Grads in 5 years
- What are our major internal or present strengths?
  - Increase in Applications
  - New Technologies for Communications
  - Creation of an EM Culture
- What are our major internal or present weaknesses?
  - Older Buildings & Aging Infrastructure
  - Inflexible Staffing w/ Mostly Tenured Faculty & Union Policy on Temporary Hires

Matching the external assessment with an internal profile permits us, later in the process, to define our strategic objectives.
Factors to be considered when you assess the external environment

PEST” Analysis
Trends and events that impact the institution
Understanding of influential factors and their effects
Degree of alignment with environments

Examples of external factors...
- Local and Regional Economic Conditions
- Price, Merit Aid, Tuition Discounting
- Regional Market Competition
- Consumer Attitudes
- Demographic Trends
- Popular Press & its “rankings”
- State and Federal Finances
- Impact of the education industry
- Gender imbalance
- Non-education options for high school toward concurrent high school/college environment
Impact of Institutional Design on Performance, Strategies, Goals, Objectives, and Resources

Examples of internal factors...

- Institutional resources
- Present strategies and processes
- Performance Indicators (institutional, state, etc), Benchmarks for anchor analysis
- Faculty and staff commitment
- Work environment
- Internal communication
- Policies and procedures performance
- Strength of academic programs
- Strength of co-curricular programs
- Facilities
- Student residential trends
- Quality...diversity...geographic mix of the student body
- Student satisfaction
- Student course-taking patterns
- Faculty/staff workload
- Discount rate and net tuition revenue trends
- Non-tuition sources of revenue and size of the endowment
Summary of Internal & External Assessment Process

- Identify & calculate cause/effect relationships
- Refine and prioritize initial findings from assessments
- List strengths, weaknesses, opportunities, and threats – Relate to PIs
- Environmental analysis is never complete
Key Performance Indicators

Data-Driven Decisions
Knowing What Works Means Using Assessments and Measurements

Use Varied Sources of Data

Institutional Surveys/Studies
- Marketing Recruitment Audit
- Admitted Student Questionnaire
- National Student Clearinghouse
  - (offers, denials, cancels, withdrawals, etc)
- CIRP - Freshman Survey
- NSSE - National Survey of Student Engagement
- FSSE - Faculty Survey of Student Engagement
- FYI Survey - Student Learning Outcomes
- Map-Works – Academic & Social Integration
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Institutional Performance Measures
- System - 64 Indicators
- Institutional Strategic Plan
- Strategic Enrollment Plan

External Comparisons
- CSRDE
- ACT
- USNWR
- Peer Comparisons
- PASSHE Comparisons

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Examples
Our Marketing Recruitment Audit in 1999
Executive Summary of Immediate Priorities

<table>
<thead>
<tr>
<th>Summary of STAMATS Recruiting Audit Report, July 2000</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recruiting and Image Challenges</strong></td>
</tr>
<tr>
<td>Provides observations and recommendations for specific recruiting functions and suggestions for branding and imaging.</td>
</tr>
<tr>
<td><strong>Competitor Analysis and Website Review</strong></td>
</tr>
<tr>
<td>Explores your current position against your primary competitors and the state university system as a whole, and provides pertinent recruiting and image recommendations.</td>
</tr>
<tr>
<td><strong>Publications Review and Recommendations</strong></td>
</tr>
<tr>
<td>Provides a review of your current publications, overview information about developing more effective publications, and recommendations for future publications.</td>
</tr>
<tr>
<td><strong>Traditional-age Student Recruiting Audit</strong></td>
</tr>
<tr>
<td>Provides a recommended recruiting funnel, which integrates the use of these publications with your recruiting strategies. Detailed recommendations concerning the developing of new recruiting strategies also were provided.</td>
</tr>
</tbody>
</table>
National High School Graduates, Actual and Projected, 1987-88 to 2013-14 (in millions)

- 1987: 2.87m
- 1988: 2.89m
- 1989: 2.97m
- 1990: 2.95m
- 1991: 2.89m
- 1992: 2.89m
- 1993: 2.88m
- 1994: 2.86m
- 1995: 2.87m
- 1996: 2.87m
- 1997: 2.88m
- 1998: 2.89m
- 1999: 2.90m
- 2000: 2.91m
- 2001: 2.92m
- 2002: 2.93m
- 2003: 2.94m
- 2004: 2.95m
- 2005: 2.96m
- 2006: 2.97m
- 2007: 2.98m
- 2008: 2.99m
- 2009: 3.00m
- 2010: 3.01m
- 2011: 3.02m
- 2012: 3.03m
- 2013: 3.04m

Source: National Center for Educational Statistics
Pennsylvania Projected Change in the Number of HS Graduates by County

Projected Change in the Number of High School Graduates,
Top 20 Pennsylvania Feeder Counties,
2005-16 (Eastern counties listed first)

Source: University Budget Office, The Pennsylvania State University Projections
Pennsylvania Projected Change in HS Graduates by County 2009-2016

Projected Percent Change in the Number of High School Graduates, by County, from 2009 to 2016

Source: University Budget Office, The Pennsylvania State University, projections exclude in and out-migration
Our Institutional Data Challenges -- Why BI?

- Lack of “cleanliness” of institutional data – disparate answers to a common query
- Flood of static print reports that result in confusion than in insights into performance
- Shadow systems that are maintained at multiple department levels
BI at SRU – Applied to Enrollment-Related Functions

- Provide flexible, ad hoc (anytime) reporting & analysis at the operational & trend levels
- Simplify operational reporting to eliminate a flood of print data reports
- Extract select longitudinal data to provide a foundation for trend analysis (2002)
- Develop data models around key institutional metrics
- Align service/intervention redesign strategies with key performance indicators
- Provide scorecards/dashboards for monitoring key performance indicators at the institutional & department levels
- Guide a “performance council” in creating open access and evidence for driving institutional performance and planning
Business Intelligence and Analytics

Current Development Phase
Use of Information to Drive Decision-Making
Using SAS – Strategic Performance Management for Enrollment

Meeting the needs of different individuals -

- **Enrollment Portal Views:**
  - **President/Provost/Vice President Level**
    (Overall Strategy Detail – 5,000 ft view)
  - **General Level View**
    (Overview Reports – No drill detail – 3000 ft View)
  - **Dean/Chair Level**
    (*Customized to College* – Mid-Level detail for college specific areas – 2,000 ft view)
  - **Enrollment Services/Institutional Research View**
    (High Detail/High Analytics – 0 foot view – Front Line)

Placing information for decision-making on every desktop -

- Making the information specific to the user and providing a launch pad to more detail

Data → Information → Knowledge → Intelligence → Wisdom
Easy Access to National Survey Results and IR Enrollment Data

Enrollment Tabs
Describe Report Content

Easy Access to Frequently Used SRU Websites

Easy Access to National Survey Results and IR Enrollment Data
Report Questions:
• "What information is necessary to make well-informed decisions (undergraduate & graduate enrollment funnel activity; conversion and yield rates; breakouts on ethnicity, regional, out-of-state and international students) on our new enrollment condition?"
• "Which performance indicators are important for us to monitor on daily basis?" (Ethnicity, Region – Out-of-State, International, by County and High School)
• "How can academic departments build relationships with our offered, deposited, and registered incoming first year and transfer students?"

Easy Access to Reports
Reports are Refreshed Daily

Informational Streaming
"How to” Videos
### Fall Freshman and Transfer (AOD) New Enrollment

<table>
<thead>
<tr>
<th>Applicant Type</th>
<th>Full Time</th>
<th>Full Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Olap Applied</td>
<td>Applicants</td>
<td>Offers</td>
</tr>
<tr>
<td></td>
<td>4,832</td>
<td>4,733</td>
</tr>
<tr>
<td></td>
<td>3,415</td>
<td>3,321</td>
</tr>
<tr>
<td></td>
<td>1,443</td>
<td>1,508</td>
</tr>
<tr>
<td></td>
<td>1,428</td>
<td>1,507</td>
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<tr>
<td></td>
<td>959</td>
<td>1,026</td>
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<td>655</td>
<td>190</td>
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<tr>
<td></td>
<td>454</td>
<td>390</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>70.67%</td>
<td>70.17%</td>
</tr>
<tr>
<td></td>
<td>42.25%</td>
<td>45.41%</td>
</tr>
<tr>
<td></td>
<td>98.96%</td>
<td>99.93%</td>
</tr>
<tr>
<td></td>
<td>923</td>
<td>1,043</td>
</tr>
<tr>
<td>Transfer</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Applicants</td>
<td>Offers</td>
</tr>
<tr>
<td></td>
<td>767</td>
<td>842</td>
</tr>
<tr>
<td></td>
<td>582</td>
<td>639</td>
</tr>
<tr>
<td></td>
<td>555</td>
<td>622</td>
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<tr>
<td></td>
<td>25</td>
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<td>7</td>
</tr>
<tr>
<td></td>
<td>131</td>
<td>181</td>
</tr>
<tr>
<td></td>
<td>83.10%</td>
<td>80.73%</td>
</tr>
<tr>
<td></td>
<td>75.59%</td>
<td>75.62%</td>
</tr>
<tr>
<td></td>
<td>96.52%</td>
<td>94.31%</td>
</tr>
<tr>
<td></td>
<td>88.30%</td>
<td>80.73%</td>
</tr>
</tbody>
</table>

### Recruitment Funnel

**Report Questions:**
- "Are applications, offers, & deposits up as compared to the same time last year?"
- "How does the offer rate compare to the same time last year and previous years?"
- "How should our waitlist strategies be changed due to the increase in applications?"
- "What impact is the increase in denials having on our communications and time?"
Two Major Outcomes from the BIE Application:

- Enrollment data is managed across the institution in a single comprehensive view of relationships and data.
- Information is now communicated across multiple organizational levels within the institution in an effort to inform key constituencies.
**Shaped by Their Times**


- Focus on children and family
- Scheduled, structured lives
- Cute childhood movies
- Multiculturalism
- Growing up digital
- Terrorism
- Heroism
- Patriotism
- Parent advocacy
- Globalism
- Stress

Conducted presentations for deans, vice presidents, academic department chairpersons, orientation advisors, orientation staff, FYRST seminar faculty, deans, enrollment services, etc. Hosted on IR website.
The Freshman Survey, 2007

- 76% - report that SRU is their first choice (78% in 2005; 79% in 2004)
  [19.7% report that SRU is their second choice (18% in 2005; 17% in 2004)]
  - 57.7% - Public 4yr Colls-low students state is first choice
  - 64.2% - All Public 4yr Colls state is first choice
- 92.8% - of SRU student report they were accepted by their first choice
  - 80.6% - of Public 4yr Colls-low students report they were accepted by their first choice
  - 84.2% - of All Pub 4 yr Colls students report they were accepted by their first choice
- 36% - apply to three or more colleges (54% in 2005; 52% in 2004)
  [28.8% applied only to SRU (27% in 2005; 30% in 2004)]
- 40% - live within 50 miles from SRU (36% in 2005; 36% in 2004)
  [4.9% live within 10 miles (1% in 2005; 4% in 2004) and 28% live 100 or more miles (28% in 2005; 27% in 2004) from SRU]
- 60% - choose SRU because of the institution’s ‘very good’ academic reputation (most common response for selecting SRU) (54% in 2005)
- 45.1% - indicate that a campus visit was a “very important” influence of the decision to attend SRU (46% in 2005)
## Campus Engagement

### 2006 National Survey of Student Engagement (NSSE)

Results from the 2006 National Survey of Student Engagement (NSSE) show that Slippery Rock University students consistently rate their experience as SRU higher than do students attending peer institutions.

The National Survey of Student Engagement (NSSE) is designed to obtain, on an annual basis, information from scores of colleges and universities nationwide about student participation in programs and activities that institutions provide for their learning and personal development. The results provide an estimate of how undergraduates spend their time and what they attain from attending college. Survey items on The National Survey of Student Engagement represents empirically confirmed “good practices” in undergraduate education. That is, they reflect behaviors by students and institutions that are associated with desired outcomes of college.

Institutions used their data to identify aspects of the undergraduate experience inside and outside the classroom that can improve through changes in policies and practices more consistent with good practices in undergraduate education. This information is also intended for use by prospective college students, their parents, college counselors, academic advisors, institutional research officers, and researchers in learning more about how students spend their time at different colleges and universities and what they gain from their experiences.

To focus discussions about the importance of student engagement and guide institutional improvement efforts, NSSE created five clusters of “benchmarks” of effective educational practice: (1) Level of academic challenge, (2) Active and collaborative learning, (3) Student-faculty interaction, (4) Enriching educational experiences, and (5) Supportive campus environment. This Benchmark Comparisons Report compares the performance of Slippery Rock University with our selected peers, selected Carnegie peers, and all NSSE institutions.

Results from the NSSE survey are used as part of Slippery Rock University’s continuous improvement program.

For more information NSSE: [http://www.sriu.edu/pages/8179.asp](http://www.sriu.edu/pages/8179.asp)

To read more about Student Engagement and NSSE, please read this USA Today news article.

### Level of Academic Challenge (LAC)

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<th>Institutional Peers Mean</th>
<th>Carnegie Peers Mean</th>
<th>NSSE 2006 Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>First-Year</td>
<td>51.7</td>
<td>49.5</td>
<td>50.5</td>
<td>51.8</td>
</tr>
<tr>
<td>Senior</td>
<td>57.8</td>
<td>54.6</td>
<td>55.3</td>
<td>55.8</td>
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### Active and Collaborative Learning (ACL)

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<tbody>
<tr>
<td>First-Year</td>
<td>43.3</td>
<td>40.2</td>
<td>40.9</td>
<td>41.3</td>
</tr>
<tr>
<td>Senior</td>
<td>54.7</td>
<td>50.4</td>
<td>50.8</td>
<td>50.4</td>
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### Student-Faculty Interaction (SFI)

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<tr>
<td>First-Year</td>
<td>34.8</td>
<td>30.83</td>
<td>31.7</td>
<td>32.1</td>
</tr>
<tr>
<td>Senior</td>
<td>45.1</td>
<td>40.4</td>
<td>40.4</td>
<td>41.3</td>
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### Enriching Educational Experiences (EEE)

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<th>Slippery Rock Mean</th>
<th>Institutional Peers Mean</th>
<th>Carnegie Peers Mean</th>
<th>NSSE 2006 Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>First-Year</td>
<td>20.1</td>
<td>25.0</td>
<td>25.8</td>
<td>26.7</td>
</tr>
<tr>
<td>Senior</td>
<td>39.0</td>
<td>36.31</td>
<td>37.4</td>
<td>39.1</td>
</tr>
</tbody>
</table>

### Supportive Campus Environment (SCE)

<table>
<thead>
<tr>
<th>Class</th>
<th>Slippery Rock Mean</th>
<th>Institutional Peers Mean</th>
<th>Carnegie Peers Mean</th>
<th>NSSE 2006 Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>First-Year</td>
<td>60.0</td>
<td>57.2</td>
<td>58.8</td>
<td>59.1</td>
</tr>
<tr>
<td>Senior</td>
<td>60.0</td>
<td>55.2</td>
<td>56.6</td>
<td>56.6</td>
</tr>
</tbody>
</table>

---

Senior's at Slippery Rock recorded responses higher than peer institutions in all five categories and exceeded the national average of all participating NSSE institutions in three of five categories—level of academic challenge, active and collaborative learning, student-faculty interaction and enriching educational experiences.
Program Research Focused on Student Learning Outcomes:
First Year Initiative Survey – Freshman Seminar

Student Learning Outcomes

<table>
<thead>
<tr>
<th>Factor Number</th>
<th>Rich</th>
<th>Description of Factor/Question</th>
<th>SRU Mean Students</th>
<th>Select 6 Mean</th>
<th>Carnegie Class</th>
<th>All Institutional Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Factor 1</td>
<td></td>
<td>Course Improved Study Strategies</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td></td>
<td>Course Improved: Completing homework assignments on time</td>
<td>5.09</td>
<td>5.23</td>
<td>5.09</td>
<td>5.00</td>
</tr>
<tr>
<td>Q2</td>
<td></td>
<td>Course Improved: Understanding of academic strengths</td>
<td>4.82</td>
<td>4.82</td>
<td>4.86</td>
<td>4.81</td>
</tr>
<tr>
<td>Q3</td>
<td></td>
<td>Course Improved: Taking effective notes in class</td>
<td>4.7</td>
<td>4.81</td>
<td>4.81</td>
<td>4.74</td>
</tr>
<tr>
<td>Q6</td>
<td></td>
<td>Course Improved: The ability to find items through the course</td>
<td>4.85</td>
<td>4.89</td>
<td>4.6</td>
<td>4.75</td>
</tr>
<tr>
<td>Q15</td>
<td></td>
<td>Course Improved: Coping with test anxiety</td>
<td>4.35</td>
<td>4.51</td>
<td>4.46</td>
<td>4.51</td>
</tr>
<tr>
<td>Q17</td>
<td></td>
<td>Course Improved: Studying with other students</td>
<td>3.48</td>
<td>4.38</td>
<td>4.48</td>
<td>4.39</td>
</tr>
<tr>
<td>Q18</td>
<td></td>
<td>Course Improved: Reviewing class notes before the next class meeting</td>
<td>4.11</td>
<td>4.24</td>
<td>4.17</td>
<td>4.19</td>
</tr>
</tbody>
</table>
Foundations of Excellence® Process

Spring – 2006 Select Taskforce Dimension Leaders and Steering Committee
Summer – 2006 Steering Committee Attends FOE National Launch Meeting
Early Fall – 2006 Identify Task Force Members and Launch FOE Process

“Behind the Scenes”
Make Decisions About Surveys – Complete Current Practices Inventory Research - Communicate to Taskforce Members – Launch FOE at President’s Retreat & Taskforce Meetings

Foundations of Excellence® Dimension Leaders Launch Work of Each Dimension

Dimension Timeline for Reports
- Philosophy – November 15
- Organization – December 15
- Learning – February 28
- Faculty – February 28
- Transitions – February 15
- All Students – February 28
- Diversity – February 2
- Roles and Purpose – March 1
- Improvement – March 1
- Steering Committee Final Report - March 20
- Dimension Leader & Taskforce Presentations April
Strategic Issues Facing the Institution

Look for the gaps between your current position and your future direction

- Aim to close the gaps or overcome the barriers
- Take advantage of the opportunities.

Strategic issues can be thought of as either opportunities or barriers to achieving our stated objectives.

- A decade of declining enrollment, resulting in low morale
- A decade of SEM planning without any authority to implement plans, resulting in a lack of trust
- A decade of budget cuts in student life activities, resulting in student dissatisfaction
- A decade of no cross-divisional program and service collaborations and silo work environments
- New leadership is motivated to take risks to effect positive change
Formulating Goals and Objectives

Identifying Strategic Issues

- Objectives and Goals (used to connote what your institution wants to accomplish...often used interchangeably)
  - Objectives are realistic statements of what you intend to accomplish...specific
  - Goals connote what an institution wants to accomplish...general

- Sevier (1998) advises planners to work from the general to the specific

- Smaller number of goals (five or six)

- Keep them uncontroversial

- Under promise-Over Deliver....
  - helps you gain the credibility you need to be more aggressive in developing future objectives.
Example:

Goal Statement and Specific Objectives:

- To attract eager and talented applicants for admission who ultimately will enroll and graduate:
  - Develop a distinctive market position by emphasizing international education opportunities, and communicate this consistently;
  - Attract and enroll talented and diverse students of high academic quality who have demonstrated the potential to contribute to the campus environment (2/3s in the top 10 percent of their high school class; scores of 1250 on the SATS; 15 percent minority);
  - Increase the willingness of families at all income levels to invest in the educational experience our institution offers (decrease percentage receiving financial aid from 65 to 55 percent)

- What you need to accomplish in order to thrive
- Realistic statements of what you intend to accomplish
- Easy to understand
- Challenging, yet achievable
- Flow from your mission and vision
Next…

Identify the Strategies

“a pattern of purposes, policies, programs, actions, decisions, and/or resource allocations that defines what an organization is, what it does, and why it does it.”

(Bryson, 1995)

Strategies provide pathways to address an institution’s challenges in ways consistent with its mission and vision.
Assign Strategies to Goals and Objectives

Without an assigned strategy, you run the risk having of just another good idea that was never implemented:

- A course of action we must pursue in order to achieve an objective
- Strategies must be detailed enough to provide directions, but they do not have to describe every step in the process.
- Keep the number of strategies manageable given time and financial constraints
- Strategies need to be assigned, or they run the risk of being not accomplished.
### Development of Strategies - Recruitment

(A simple example from one operational area using one objective. Each operational area within EM could have its own series of grids, developed jointly by the staff.)

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Timeline</th>
<th>Budget</th>
<th>Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raise auto-admit admissions indicator from 900 SAT to 930 SAT and 2.5 GPA to 2.75 GPA</td>
<td>Fall 2004 for class entering Fall 2005 Ongoing</td>
<td>-- N/A --</td>
<td>Admissions Freshman Services Director</td>
</tr>
<tr>
<td>Create marketing plan around the focus of raising the standards at SRU.</td>
<td>Fall 2004 for class entering Fall 2005 Ongoing</td>
<td>$$$ Public Relations &amp; Enrollment Services Collaborative</td>
<td>Revision and development of key marketing messages through the use of commercials, print publications, and CD Presidential Communications internal and external to campus. Admissions communications (guidance counselors, families, alumni, community, etc.)</td>
</tr>
<tr>
<td>Research on quality of applications, offers, deposits, enrolled by major</td>
<td>Fall 2004 Ongoing</td>
<td>-- N/A --</td>
<td>Enrollment Services and Institutional Research Campus Communications</td>
</tr>
<tr>
<td>Decrease of first year to cohort and increase of transfer and graduate enrollment. Increase of retention rates.</td>
<td>Fall 2004 Ongoing</td>
<td>-- N/A --</td>
<td>Enrollment Services, Undergraduate &amp; Graduate Admissions, Retention, Academic Services, &amp; Student Life</td>
</tr>
</tbody>
</table>
Development of Strategies - Retention

(A simple example from one operational area using one objective. Each operational area within EM could have its own series of grids, developed jointly by the staff.)

Objective: Increase first to second year retention rates by 6%-8% over a three year period (1%-2% annually).

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Timeline</th>
<th>Budget</th>
<th>Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorporate a freshman orientation seminar and learning community cluster effort in the FYE</td>
<td>1st semester</td>
<td>Freshman Seminar Instructional costs</td>
<td>Academic Services Faculty</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Programming/training for faculty</td>
<td>Faculty across all colleges</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Publishing materials</td>
<td>Collaborations across campus divisions</td>
</tr>
<tr>
<td>Infuse an series of interventions into the first year experience: enrollment verification (housing, food services, and class attendance), early alert student attendance &amp; performance; mid-term review; and final review.</td>
<td>1st/2nd semester</td>
<td>Duplication of materials</td>
<td>Retention Services Director</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Small mailing cost</td>
<td>Coordination</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Freshman Seminar Faculty, FYRST Academic Advisors,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Resident Coordinators, First Year Instructional Faculty</td>
</tr>
<tr>
<td>Increase academic services interventions with students in need of academic assistances</td>
<td>1st/2nd semester</td>
<td>$500 duplicating</td>
<td>Tutoring Coordinator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Services already in place</td>
<td>SI Coordinator</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>College Success Workshops</td>
</tr>
<tr>
<td>Increase Quality of Diversity</td>
<td>Ongoing</td>
<td>Operational Costs/Grants</td>
<td>Admissions Staff/Bus trips/Opportunity</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Knocks/Cultivate new areas and attend more focused events involving minorities</td>
</tr>
</tbody>
</table>
Evaluation, Assessment, and Measuring Progress

Key Performance Indicators

Plan…Implement…Evaluate…Plan

- Assess each objective and strategy
  - Insufficient resources for implementation
  - Challenges change, requiring new strategies
  - Too many strategies on one specific objective
  - Political environment may shift with changing leadership or priorities

- Has the timetable been adhered to?
- Has the strategy implemented helped us to achieve our major goals and objectives?

- KPIs
  - (admission prospects, applicants, acceptance rate, yield, average SAT, HSGPA, class rank, minority student enrollment, regional enrollment, international enrollment, geographic diversity, financial aid of applicants, grants awarded, discount rate, enrollment by major, retention and graduation rates, percentages of graduates employed and in graduate school)
Stay the course….

- Stay focused on what is important-
  - How will the institution’s mission and vision will be fulfilled?
- Focus on indicators of success or failure-
  - Pay attention to the indicators that were used to argue for the strategy.
- Review the issues-
  - What issues helped form the initial strategies to respond to changing conditions
- Stay fresh-
  - Build energy and enthusiasm for continuing the strategies that produce results for identifying new strategies to replace those that are not effective.
Take the Time to Plan: Keep it Simple

- A full year is necessary to plan
- Most time-consuming activity will be formulating the objectives and strategies
  - Operational planning should be ‘decentralized’ to the departments
    - Strategies are articulated, assignments made, budgets determined, and evaluation mechanisms put into place
Strategic thinking and planning requires a systems approach -- that is -- it requires the ability to look at the entire institution as a whole, understanding its mission and values, relating its goals and objectives to those core values, and providing programs and services in line with the mission.

Strategic thinking and decision making therefore provides cohesion to the entire institution.

It informs a tactical-level approach.
“a pattern of purposes, policies, programs, actions, decisions, and/or resource allocations that defines what an organization is, what it does, and why it does it.”
(Bryson, 1995)

Strategies provide pathways to address an institution’s challenges in ways consistent with its mission and vision.
Marketing Strategies
Marketing:

- Define Marketing Goals
- Determine Key Markets
- Determine Tactics
- Measuring Success
Web Presence

Old

New
Experience the Dearborn Difference

- Nationally ranked and accredited programs
- Over 80 bachelor and master degree programs
- 125 student organizations
- $3.5 million in four-year scholarships available for new students
- Apply by December 15 for scholarship consideration

Discover the doors a Michigan education will open for you!

www.umich.edu
Our Marketing Recruitment Audit in 2000 led us to identify several of our immediate priorities.

---

**Recruiting Audit Report, July 2000**

- Recruiting and Image Challenges
  - Provides observations and recommendations for specific recruiting functions and suggestions for branding and imaging.

- Competitor Analysis and Website Review
  - Explores your current position against your primary competitors and the state university system as a whole, and provides pertinent recruiting and image recommendations.

- Publications Review and Recommendations
  - Provides a review of your current publications, overview information about developing more effective publications, and recommendations for future publications.

- Traditional-age Student Recruiting Audit
  - Provides a recommended recruiting funnel, which integrates the use of these publications with your recruiting strategies. Detailed recommendations concerning the developing of new recruiting strategies also were provided.

---

**Example**

**Consideration External Consultation: Recruitment Audit**

**Competitor Analysis**

**TRADITIONAL AGE RECRUITING AUDIT**

**COMPETITOR ANALYSIS WEBSITE REVIEW**

**PUBLICATIONS REVIEW**

**RECRUITING IMAGE CHALLENGES**
Create Brand Identity
Adding an Element of Personalization to Our Brand Identity

One-to-One Marketing
Moving Away From: Traditional Mass Collateral & Saturation Travel

Adopting an Ongoing Basis:

Direct mail, especially call-to-action with variable print
Website Development
Use of Students in Marketing

It's a great time to be at Slippery Rock University!

The student body includes... National champion head coach... Division I athletics... and a strong support system... for academic success...

Do YOU have what it takes to ROCK? Slippery Rock University

Rock Solid Education

www.sru.edu
800.929.4778

Slippery Rock University

It's a great time to be at Slippery Rock University!
Growing the Brand

It's a great time to be at Slippery Rock University!

The evidence is everywhere...Record enrollments...Incredible new student housing...A brand new, state-of-the-art technology and science education center...Cutting edge, career-focused academic programs.

Of course, we still have all the things Slippery Rock University is known for...outstanding faculty members who take a personal interest in your success, hands-on learning opportunities and lots of bright minds and fun people to be around.

It's a great time to be at Slippery Rock University. Shouldn't you be here? We offer more than 60 undergraduate academic majors, a select honors program, small classes, leadership development and numerous study-abroad opportunities.

Give us a call today to see how you can build your Rock Solid career through our:
- College of Business, Information and Social Sciences
- College of Education
- College of Health, Environment and Science
- College of Humanities, Fine and Performing Arts

Slippery Rock University™
www.SRU.edu
800-929-4778

A member of the Pennsylvania State System of Higher Education
E-Cards

Slippery Rock University
E-cards

Use SRU E-cards to keep in touch with family and friends - or to show your ROCK PRIDE. Using E-cards is fun, free and easy as 1, 2, 3!

1 Select an image from one of the categories:
- Campus Buildings and Scenes (16 images)
- Fine and Performing Arts (8 images)
- Athletics and Recreation (30 images)
- Campus Life (9 images)
- Academics (7 images)

- Click here to see your favorites and latest additions

Received an SRU E-card?
View your card here by copying the pickup code from your email.

Card ID: [Enter ID] View

Click and send the card!
Edit Card  Send Card

3

Slippery Rock University
E-cards

To: Carrie <amanda.yale@sr.edu>
From: Amanda Yale <amanda.yale@sr.edu>

Thank you for attending our visitation program this past weekend...!

Hi Jennifer, it was so good to see you and your family at our Saturday Visitaton Program. I know that you met with the faculty from your major program, Exercise Science and that you also met with the soccer coach in the afternoon. I do hope your day was productive and fun! Let me know if you have any further questions. Do anticipate receiving information on our Orientation Program soon!
My best to you and your family.

North Hall sets the tone for a quiet yet friendly living atmosphere at Slippery Rock University. The only all-couples residential facility, features rooms with high ceilings, a courtyard and other traditional designs.
## Recruitment and Marketing Strategies:

### First Year Students
- Recruiting to build relationships through targeted and segmented recruitment strategies
  - Improving inquiry to applicant conversion rate
  - Improving offer to deposit/enrollment yield rate
- Articulating “niche” programs in presentations
- Building relationships with families during small group family visitations
- Documenting the yield rates from high schools, fairs, visitation programs, etc.
- Improve quality of incoming students
- Discovering why admitted students choose to attend another institution and identifying competitors’ successful programs

### Transfers Year Students
- Recruiting to build relationships through targeted and segmented recruitment strategies
  - Improving inquiry to applicant conversion rate
  - Improving offer to deposit/enrollment yield rate
- Articulating “niche” programs in presentations/discussions
- Discussion on Program Curriculum Requirements for Transferability of Courses
- Building relationships with community colleges
- Building relationships with families during individual family visitations
- Documenting the yield rates from community colleges and other institutions.
- Discovering why admitted students choose to attend another institution and identifying competitors’ successful programs
Recruiting to Build Relationships

- Dynamic open-house style events
- Knowledgeable, personable, committed admission professionals with strong campus connections
- A solid enrollment culture and collaboration across campus; admissions is not a silo based enterprise
Creating An Engaging Campus Visitation Experience

**Flexible Visitation Options**

- Weekly Small Group Family Visitation Experiences
- Saturday Small Group Family Visitations
- Saturday Large Group Showcase Programs
- Summer Preview Programs
- Summer Career Day Programs
- Intercultural Program Experiences
- Bus Visitations for Specific Student Groups
- Individual Sessions
- College Fairs
- Alumni Networks
- Community College Visitation Days
- Transfer Days
Graduate Portfolio

- Programs
- Student Testimonies
- Benefits & Outcomes of Programs
- Application
- Graduate Assistantships
- Financial Aid
- Living Environment
- Campus Environment
- Learning Environment
- Contact Information by Department/Faculty
- Locations
Slippery Rock University has one of the highest levels of awareness of any school in the region.
Overall Perception
How would you rate Slippery Rock overall?

La Roche College
West Liberty State University
Point Park College
Edinboro University
Seton Hill University
Thiel College
California University
Gannon University
Westminster College
Carlow College
Chatham College
Geneva College
Robert Morris University
Saint Francis University
Pitt - Greensburg
Saint Vincent College
Pitt - Johnstown
Allegheny College
Mercyhurst College
Penn State - Behrend
Indiana University of Pennsylvania
Waynesburg
Clarion University
Slippery Rock University
West Virginia University
Duquesne University
Washington and Jefferson College
Bethany College
Pitt - Main Campus
Penn State - Main Campus
Carnegie Mellon University
Duquesne University

Margin of error is +/- 2%.

Slippery Rock's overall perception rating is solidly in the middle range of all schools.
Recruitment & Financial Aid Strategies
Recruitment:

- Recruiting to build relationships through targeted and segmented recruitment strategies
  - Improving inquiry to applicant conversion rate
  - Improving offer to deposit/enrollment yield rate
- Articulating “niche” programs in presentations
- Building relationships with families during small group family visitations
- Documenting the yield rates from high schools, fairs, visitation programs, etc.
- Discovering why admitted students choose to attend another institution and identifying competitors’ successful programs
CD Development – Capturing Campus Culture

Start Here

Starting your life at The Rock can be a nerve-wracking experience. What do I bring? What will my roommate be like? Admit it – you’re excited, but probably a little nervous, too.

Well, guess what? Thousands and thousands of students have come here since our first class back in 1889 and each faced a different set of challenges. (And they might not admit it, but many of your professors probably had a few butterflies during THEIR first days here, too.)

Campus Living

Life at SRU

LIFE AT SRU
START HERE
CAMPUS LIVING
SOCIAL ACTIVITIES

Start Here

Learning

More Than A Degree

Rock Solid Advice

Rock Around

Resources

Macromedia Flash Player 7

File View Control Help

LIFE AT SRU
START HERE
CAMPUS LIVING
SOCIAL ACTIVITIES

Orientation

Move In Day

What To Bring

Click on the thumbnail(s) to view

EXIT PRESENTATION
CD Development – Capturing Campus Culture
YouTube – SRU CD Videos

Slippery Rock University - President

President introduces the key initiatives that are driving Slippery Rock University
Time: 00:59

Slippery Rock University - Making SRU Better

Students and faculty discuss some of the many improvements occurring at Slippery Rock University and in the surrounding community
Time: 02:06

Slippery Rock University - Student

Visit Slippery Rock University students describe themselves and other students
Time: 06:45

Slippery Rock University - Alumni

Alumni discuss the impact Slippery Rock University has had on their lives
Time: 06:12

Slippery Rock University - Parents

General advice for parents who are thinking of sending their students to SRU
Time: 02:56

Slippery Rock University - Friends

Students describe how to meet new friends in college
Time: 01:19

Slippery Rock University - Professors

Profeessors discuss what they enjoy about their professions
Time: 03:09
### iTunes SRU Videos and E-News

**Podcast Description**

A one-stop shop for information about making a smooth transition to Slippery Rock University.

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Time</th>
<th>Artist</th>
<th>Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Transfer Opportunities Video</td>
<td>2:15</td>
<td>Robert Lagnese</td>
<td>5/29</td>
</tr>
<tr>
<td>2</td>
<td>Deposit E-Newsletter</td>
<td></td>
<td>robert.lagnese@sru</td>
<td>5/24</td>
</tr>
<tr>
<td>3</td>
<td>Offer E-Newsletter</td>
<td></td>
<td>robert.lagnese@sru</td>
<td>5/24</td>
</tr>
<tr>
<td>4</td>
<td>Prospect E-Newsletter</td>
<td></td>
<td>robert.lagnese@sru</td>
<td>5/24</td>
</tr>
</tbody>
</table>
What do our transfer students say about the transfer experience?

Virtual landing pads for today’s technology savvy students
How the Financial Aid Office Can Help with your Enrollment Management Initiatives

- Helping you understand the current economic environment
- Collecting and Analyzing Data
- Leveraging Institutional Aid
- Improving Aid-Related Communication and Outreach
- Implementing Debt Management Training
Strategies for Improving Communications and Outreach

- Provide “early” financial aid awards or estimates to families.
- Create a tele-counseling program to reach out to families immediately after freshman awards have been sent to insure students & families received and understand the awards.
- Provide targeted financial aid & billing messages at Orientation.
- Provide links from the financial aid office webpage to scholarship opportunities (institutional, federal, state, private).
- Create communications that prompt and remind students to file the FAFSA in a timely manner.
- Review all printed and electronic communications to be sure they have the right message, are communicated at the right time, and are student friendly and understandable.
Using Debt Management Tools to Support Increased Retention and Alumni Giving

- Provide counseling about budgets, loans, credit cards, aid & scholarship opportunities
- Educate the FTFY students on how to reduce borrowing, debt and potential financial stressors while enrolled.
- Help future alumni graduate with minimal debt, thus enhancing financial freedom as alums, able to give back to the school.
Improving Student Learning and Success
Program Characteristics

- Intentionally
- Integration of Effort
- Collaborations & Partnerships
- Positive Interventions with Students
- Information Driven Decision Making to Assess
Student Learning and Success Strategies:

- Understanding where and why your institution retains and loses students
- Identifying institutional weaknesses which must be addressed to improve student learning and success
- Identifying academic transitional services which meet the needs of students (LCC/FYRST Seminar, FYRST advising, tutoring, supplemental instruction, early alert program & mid-term review, etc.)
- Identify social/personal development services which meet the needs of students (WOW, CA 1-1 interactions @ check-in, FLSP, Center for Student Leadership, co-curricular transcript, residential commons/interest floors, late night programming)
- Articulating how students are guided through the maze of curricular and career choices
- Creating collaborations across campus focusing on improving student learning and success
Actions, Programs, Initiatives, Processes, and Programs

- FYRST Seminar/LCC
- Profile of at-risk students for developmental advising and interventions
- Profile of persisters for use in recruitment
- Use of meal card and residential assistants to determine student engagement
- Early Alert System for attendance and initial academic challenges
- Mid-term & Final Grade Review
- Regular review of enrollment status of entering cohorts
- Review of policies impacting enrollments (drop/add, withdrawal, payment of bill, health forms, etc.)
- Enhanced engagement activities in the first year
- New Tutoring Center outreach
- New Summer Reading Program

- Installation of Leadership Programs
- Infusing of new weekend activities
- New Science & Technology Building
- New Physical Therapy Building
- State of the Art Technology in Nearly all Classrooms
- Renovations of Auditorium with State of the Art Technology
- Renovations of Classroom Buildings
- Building New Suite Style Residential Communities
- New walkways, gathering spaces, and meeting areas
- New recreation center and fields
- Urban Recruitment Connections
- Opportunity Knocks Recruitment Initiative
- Multiple Choices for Visiting Campus
- Education & Information to Guidance Counselors
- Web Resources
- CD Development
Time Line of Student Learning and Success Strategies

2000
FYRST Seminar/ LCC/50%
Infusion of Student Life, Career Services, etc in FYRST
Retention Services
Early Alert w/ Resident Assts.
Improve Web Applications
Raised Admissions Standards

2001
FYRST Seminar/ LCC/60%
Retention Services
Early Attendance Reports
Early Alert w/ Resident Assts.
Improve Web Applications
Raised Admissions Standards

2002
National Award-Retention
FYRST Seminar/ LCC70%
Web Application- My Rock One Stop
Created waitlist admissions strategy

2003
FYRST Seminar 93%/LCC/75%
FYRST Peer Assistants/45 Sections
Integrated Peer Assistant Program in FYRST Seminar

2004
FYRST Seminar 96%/LCC/76%
Integrated Peer Assistant
Integrated Leadership in FYRST Seminar
Enhancements to E-Communications Map-Works Implementation

2005
FYRST Seminar 93%/LCC/75%
FYRST Peer Assistants/49 Sections
Integrated Peer Assistant Program in FYRST Seminar

2006
FYRST Seminar 95%/LCC/75%
FYRST Peer Assistants/49 Sections
Integrated Peer Assistant Program in FYRST Seminar
Development of FLSP
Increase Use of Tutoring

2007
FYRST Seminar 96%/LCC/76%
Integrated Peer Assistant
Integrated Leadership in FYRST Seminar
Enhancements to E-Communications Map-Works Implementation

2008
FYRST Seminar 95%/LCC/75%
FYRST Peer Assistants/49 Sections
Integrated Peer Assistant Program in FYRST Seminar
Development of FLSP
Increase Use of Tutoring
Creating a Call to Action - Early Orientation Programming

2001 National Award Publication
Students and Families attend parallel programming activities
Continuing relationship building from spring/summer programming to the fall semester.
WOW: Week of Welcome

- **Friday** – Move in Day...
  - 700 Welcoming volunteers help parents
  - Welcome Ceremony-SRU Traditions

- **Saturday** – Welcome to SRU Activities (attendance required)
  - Summer Reading Program
  - Theme Picnic, Outdoor Movie, Fireworks...and more!

- **Sunday** – More FUN-filled Festivities

- **Monday** – Classes Start
Launched a web-site designed as a one-stop site for students – Fall 2003
FYRST features a host of academic services designed to support the teaching and learning process.
Enrollment Services
Divisional Model for Transition Services for First Year Students

F Y R S T

Department of Academic Services
- Orientation
- FYRST & Exploratory Advising
- Learning Community Clusters
- Freshman Seminar (FYRST)
- Tutoring
- College Success Workshops
- ACT 101 UEP Services
- Peer Mentoring
- A-Qualified Student Services
- Frederick Douglas Institute
- Diversity Seminars
- Probationary/Readmission Academic Services
- Advisement & Learning Assistance
- Learning Strategies
- Developmental Math Coursework

Retention Services Director
Early Intervention Strategies
Transfer & Adult Advocacy
FYRST Readmission & Probation

Services for Students with Disabilities

FYRST Seminar
(Advisement Center Director/Faculty)
Learning Community Cluster
(Orientation Director/Faculty)
Peer Assistance
(Asst Director of Advisement & ACT Assistant Director/Faculty)
Diversity Clusters
(FDI Coordinator/Exploratory Coordinator)

56 FYRST Seminar Faculty
70 LCC Faculty
What does the first year experience look like on your campus?

How do you support the sophomore year experience?

What does the senior year experience look like on your campus?
Summer Reading

New students share a common academic experience

- WOW
- Author Presentation
- Small Group Presentation
- Carry-over to courses this fall
Research has found that freshman orientation seminars and learning community cluster programs are effective programming efforts for:

- responding to the academic and social/personal needs of first year students,
- assisting first year students in becoming integrated into an institution’s academic environment.
Program Development for One Strategy – LCC/FYRST

Over 700 students were enrolled in the LCC/FYRST Seminar model comprising 27 clusters (about 52%).
Organizational & communication effort
Engaging faculty across campus in the FYRST Seminar

Over 1000 students in 37 clusters and 44 FYRST Seminars (about 72%)
Create & improve collaborations within the clusters
Apply retention research and assessment outcomes

Over 1200 students in 40 clusters and 50 FYRST Seminars
Improving communications among FYRST Seminar faculty and cluster faculty and FYRST Seminar faculty and their students – Use of Blackboard

Over 1500 students enrolled in 40+ clusters and 56 FYRST Seminars
Continuing development of cluster communications and faculty development – All clusters
Peer Assistance Initiative in 43 clusters
Living-Learning Communities - Pilot
Diversity-Themed Communities – Pilot
Map-Works Implementation


Over 1200 students in 40 clusters and 50 FYRST Seminars
Improving communications among FYRST Seminar faculty and cluster faculty and FYRST Seminar faculty and their students

Over 1200 students in 40 clusters and 50 FYRST Seminars
Improving communications among FYRST Seminar faculty and cluster faculty and FYRST Seminar faculty and their students

Over 700 students were enrolled in the LCC/FYRST Seminar model comprising 27 clusters (about 52%).
How are faculty engaged with the first year experience on your campus?
Faculty Development Needs – Beyond a 2-Day Professional Development Workshop

- Provide information on course content and process.
- Present materials in a consistent & professional manner.
- Create an environment where materials & information are accessible 24/7/365.
- Provide easily accessible assessment information.
- Build communications streams among the faculty.
- Create an environment where faculty can build and enhance relationships with students.
Two Levels of Functionality for Faculty Usage – 5-6 Months of Development

Assistance to Digitize Docs and Shape the Vision (Consultant Assistance)

**TIER I:**

- Professional Development Tier for Use by ALL FYRST Faculty

  - Host information related to the professional development of faculty who teach the seminar – "What is a freshman seminar?" and "Strategies for Teaching the Seminar."

  - Host samples of course materials, resources, and activities by topic.

  - Use as a communications tool for FYRST faculty to communicate with each other.
TIER II:

Use of Blackboard in FYRST Seminar Course by an Individual Faculty Member to...

- post course materials, announcements, reading assignments, web links.
- communicate with his/her students on course assignments, institutional activities and procedures, readings, etc.
- initiate communication among small groups of students within a class and send group e-mails.
- survey and assess student progress.
- post grades.
Freshman Seminar –

An Opportunity to Build Partnerships & Collaborations Across Campus

 Builds partnerships between academic faculty and student affair & academic affairs professionals.
 Volunteer as guest speakers on various topics.

- Library Staff
- Career Services
- Health Services Peer Leaders
- Community Service Learning
- Financial Aid
- Intercultural Programs
- Tutoring/College Success Workshops
- Residence Life – Living/Learning Communities
- Student Leadership
- Student Government Association
- Bridge Program
- Student Organizations
- DARS/Liberal Studies Presentations
- Faculty from Various Departments
Comparison of students enrolled in the cluster experience and students not enrolled:

- Institutional Integration Factors (Pascarella & Terenzini)
  - Peer interactions *
  - Faculty interactions *
- Academic and Intellectual Development
- Institutional and Goal Commitment *
- Faculty Concern for Student Development *

- Academic performance/QPA
- Student persistence
- Credits attempted/earned
- Faculty Qualitative Evaluations
- First Year Initiative Student Learning Outcomes Performance
First Year Initiative Project

### Factor 1: Course Improved Study Strategies

<table>
<thead>
<tr>
<th>Item Description</th>
<th>SRU Mean</th>
<th>Select 6 Mean</th>
<th>Carnegie Class Mean</th>
<th>All Institution Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Improved: Completing homework assignments on time</td>
<td>4.58</td>
<td>4.66</td>
<td>4.57</td>
<td>4.57</td>
</tr>
<tr>
<td>Course Improved: Understanding of academic strengths</td>
<td>4.82</td>
<td>4.82</td>
<td>4.86</td>
<td>4.81</td>
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<tr>
<td>Course Improved: Taking effective notes in class</td>
<td>4.7</td>
<td>4.81</td>
<td>4.81</td>
<td>4.74</td>
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<tr>
<td>Course Improved: The ability to find items through the test preparation skills</td>
<td>4.85</td>
<td>4.89</td>
<td>4.6</td>
<td>4.75</td>
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<tr>
<td>Course Improved: Coping with test anxiety</td>
<td>4.35</td>
<td>4.51</td>
<td>4.46</td>
<td>4.51</td>
</tr>
<tr>
<td>Course Improved: Studying with other students</td>
<td>4.35</td>
<td>4.34</td>
<td>4.18</td>
<td>4.16</td>
</tr>
</tbody>
</table>

#### Level of Statistical Significance
- ***: p < .001
- **: p < .01
- *: p < .05
- no diff: There is no statistical difference between these means
- : SRU has a statistically lower mean than the mean of the comparative group
- : SRU has a statistically higher mean than the mean of the comparative group

*NOTE: Weighted Mean and Standard Deviation is calculated without SRU’s data included.*
Faculty Partnerships

Critical Role of Faculty

Faces Of Our Faculty

At The Rock, you'll be challenged like you've never been before - by faculty members who are respected experts in their fields. Experts who are on the cutting edge of research, but with practical, real-world experience that ensures you're prepared for the big world on the outside of campus.

But remember - Slippery Rock is a community. And the professor you know from the classroom or lab is also a real human being with interests that extend far beyond the classroom.

LEARNING @ SRU

FACES OF OUR FACULTY

THE INSIDE SCOOP ON OUR FACULTY
Retention Services Office

- Developed Early Alert Services
  - Enrollment Verification
    - Meal Cards
    - Residential Housing
    - Early Attendance Reports
  - Map-Works – Academic and Social Integration Survey & Intervention
  - Infused Mid-term Review/Final Review of First Year Grades
- Enhanced Connections with Faculty –
  - Department Receptions
  - Academic Progress Review
  - FYRST Progression Requirements
- Coordinated FYRST Suspension/Probation/Dismissal Activities (Readmission and Probationary Contracts)
Paradigm Shift

Scenario: A student is struggling in a number of different areas during her first few weeks on campus.

How do we know that she is struggling?

Which areas on campus will be most likely to assist her?

Will the service that she receives be comprehensive in nature?

Who is she most likely to seek help from?

Should assistance be provided via the institution through a number of critical interventions through a number of critical departments/areas at multiple levels of the institution?

What are the best approaches to provide these services?
MAP-Works Process

- Expectations
- Behaviors

Transition Survey

3rd Week

- Student Profile
- Institution Profile
- Campus Resources

Data Transfer

Faculty/Staff Reporting

- Student Summary
- Scan Students

Support / Intervention

Student Report

4th - 5th Week

- Social Norming
- Expectations
- Campus Resources

Campus Resources

Student Profile

- Institution Profile
- Campus Resources

Institution Profile

Scan Students

Slippery Rock University of Pennsylvania

The Degree that Makes the Difference
umd.umich.edu
Student Life Initiatives

- **2000**: Development of Campus-Wide Integrated Student Activities Programming
- **2001**: Center for Student Leadership Developed
- **2002**: WOW (Week of Welcome) – 2 day program
- **2003**: WOW (Week of Welcome) – 1 day program
- **2004**: Development of Late Night Programming
- **2005**: Development of Position for Coordinator for Student Transitions
- **2006**: Residence Hall Staff Early Alert Reports on Potential Withdrawals
- **2007**: Students of Concern Meetings
- **2008**: Emerging Leaders Program Development

**Student Leadership Travel Abroad Spring Semester**

**Early Alert Reports on Potential Withdrawals**

**Meetings**
Academic Affairs and Student Life Collaborative Efforts

- Recruitment and Orientation Functions (All areas)
- Increased opportunities for student life programming and intercultural programming (Student Activities and Intercultural Programming)
- Increased peer mentoring relationships (Academic Services and Intercultural Programs)
- Increased student leadership opportunities (Center for Student Involvement & Leadership - CSIL)
  - Freshman Leadership
  - Student Ambassadors
  - Emerging Leaders
  - Student Government Association and over 120 clubs, organizations, and honoraries
- Increased programming on weekends and evenings (Union Program Board & Student Activities)
- Increased seminar, workshop, internship and practicum experiences aligned with major programs (Academic programs)
- Increased mentoring alignments with alumni (Alumni Affairs)
- Developing a Co-curricular Experiential Resume Program (2004 Fall)
- Living – Learning Communities (Academic Services and Residence Life)
- Tutorial Services (Tutoring and Residence Life)
Leadership

- Center for Student Involvement & Leadership
- Freshmen Leader Scholar Program
- Emerging Leader Program
- Shadow Program
- Leadership Skills Series
Time Line of Physical Changes on Campus

- **2000**: New Recreation Center Opens
- **2001**: Classroom Renovations, Technology Updates in classrooms
- **2002**: Classroom Renovations, Technology Updates in classrooms
- **2003**: Classroom Renovations, Technology Updates in classrooms, Renovations to University Union Meeting Rooms
- **2004**: New Physical Therapy Building Opens
- **2005**: Construction of New Science & Technology Building
- **2006**: Construction of New Residence Halls
- **2007**: Approval of New Union Planning of New University Entry
- **2008**: Regional Learning Alliance Opens with 12 Higher Education Partners/Workforce Development
  - New student walkway connecting both lower and upper campus – symbolic of student learning experiences
New Residential Suites

- No more than 2 students share 1 bathroom
- 27/7 Welcome Desk
- Microwave and Refrigerator in each unit
- Individual thermostat controls
- Intentional Living Learning Design
- Residential Commons and Interest Floors
- Faculty Fellows Program
Creating Supporting Venues – Physical Structures & Facilities

Examples
Designing Services to Meet Student Needs

What do we want our students to experience?
How do we want to shape these experiences?

Behind the scenes a group of Enrollment Services staff, finance and administration, and information technology have been meeting regularly to plan for a “One Stop Services Center.”

This concept will include cross-functional training of services and organization of services in a one-stop physical location.

- Welcome Center
  - Undergraduate Admissions
    - First Year Students
    - Transfer Students
  - Graduate Admissions
  - Enrollment Services
  - Retention Services

- Academic Records & Summer School
- Retention Services
- Financial Aid
- Student Accounts
- Academic Services
- Career Services
- Services for Students with Disabilities
- ID Office
- Parking
- Banking
New Suite Style Residential Facilities
Continuing the Process

Although it is true that the plan’s success will be measured by its implementation and resultant outcomes, it also is true that the process helps bring people together to consider objectives and strategies that are key to institutional viability.

(Bryson, 1995)
What are the fundamental lessons learned?

Five Key Factors to Enrollment Success at the Rock…

- Have unmistakable commitment from the top
- Get the right people on the bus, fill the tank with gas (resources & support), and let them go (freedom to be creative in an environment conducive to risk-taking)
- Establish fully integrated campus involvement and create opportunities for collaborations (faculty, academic affairs, student life, facilities, finance, etc)
- Make data-based decision-making and develop a plan of action as a team
- Do something! NOW! Don’t wait to develop the perfect plan before acting.
Insanity is defined as...

Doing the same things tomorrow that we do today and expecting different results.

Our focus...

Be strategic....Plan...Implement....Assess...Plan

“Make strategic changes based on quantitative and qualitative research”..... “If it moves, measure it...... Assessment... Assessment... Assessment”