

ENROLLMENT MANAGER

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A MIRACLE ON 103RD STREET (THE CHICAGO STORY)

John W. Dysart
President
The Dysart Group, Inc.

Beth Gierach
Associate Vice President for Enrollment Services
Saint Xavier University

The 1993-94 academic year marked the real turning point. Saint Xavier University faced a significant financial crisis. While the institution had faced tight budgets in the past, this was the first real budget shortfall and no one saw it coming. That year started the first serious discussions about the fate of the small, Catholic, university located in the suburbs of Chicago.

The Background

By the time a new enrollment plan was designed in 1997, the University was in a precarious situation. It simply did not have a sufficient number of inquiries (prospective students) to achieve its recruitment goals. The applicant pools for freshmen, transfer and adult students had been stagnant for years and the vast majority originated from the local area. The number of undergraduate enrollments had been declining, the graduate programs were anemic, few students were living in the residence halls and more than one-third of the students were enrolled at part-time status. The inability to be selective in the admission process meant that the academic credentials of entering students were below the national average.

The discount rate at Saint Xavier University was lower than the national average for similar institutions, but low discount rates were not enough to offset pricing strategies

that placed the University well below the costs for similar institutions. The University was not generating sufficient net tuition revenue to achieve its educational goals. A very small endowment contributed to the revenue challenges.

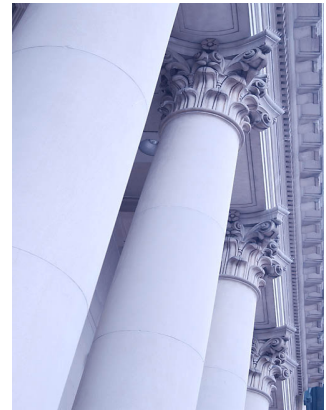
Under-enrollment led to student/faculty ratios of barely 10 to 1. While perhaps beneficial for students and faculty, the ratio was a financial disaster for the institution. Lack of sufficient net revenue meant a backlog of maintenance and numerous infrastructure needs. The challenges at the University were more than a concern about numbers and revenue; decision-makers began to realize that the situation put the pursuit of the University's core values in jeopardy.

Strategic Objectives

The President brought together a core group of institutional leaders to review the challenges, research the possibilities and make specific and data-driven recommendations for change. This team established a general set of strategic objectives:

- Significantly Increase Traditional Undergraduate Enrollment
 - Increase Operating Revenue through Growth and Pricing
 - Expand the Geographic Diversity of the Student Population
 - Improve Academic Quality
 - Attract More Students with the Ability to Pay
 - Establish a Resident Student Population
- (See *A Miracle* p.2)

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A MIRACLE CONTINUED:

- Improve Institutional Efficiencies and Productivity
- Raise Student/Faculty Ratios

Strategies and Tactics

A higher education enrollment consultant was brought in to assist decision-makers in creating a recruitment and financial aid plan that would enable the University to attain its new set of strategic objectives. After a comprehensive review of the practices and procedures at that time, the leadership team agreed upon an aggressive set of new initiatives.

In order to begin to expand the geographic reach of the institution, more names were purchased from American College Testing for surrounding states. The "search piece" was deemed ineffective since SXU was not a well-known university outside of the local Chicago area. It was decided to replace the traditional brochure with a letter. University representatives contacted Chicago Mayor Richard M. Daley's office to ask if he would be willing to author a letter of introduction to prospective students about Saint Xavier University. He agreed and a letter from the mayor's office has been the first correspondence received by prospective students about the University for nearly a decade. The response has been tremendous as the inquiry pool has nearly doubled over the last decade and become significantly more geographically diverse.

Institutional scholarship and grant programs were dramatically altered. The amounts and award parameters were targeted and offers were made much earlier in the cycle. Award amounts were designed to both recognize academic talent and meet financial need.

A systematic communication plan was implemented to correspond with inquiries and applicants over the course of the recruitment cycle. Monthly telephone calls, periodic email messages and a direct mail campaign were introduced to educate prospective students and their families about the University. The admission counselors took primary responsibility for communicating with the applicants.

Initially, the University contracted with a telemarketing firm to conduct systematic communication with inquiries. Within two years, this function was brought to campus with the establishment of the Communications Center. Permanent, part-time professionals were hired to work four evenings a week from 4:00 to 9:00 to telephone prospective

students. Creating the Communication Center on campus provided opportunities for better control, supervision and reporting.

The University invested in an administrative computing system to bring efficiencies to all offices and better coordinate activities. This move was particularly important because it enabled an emphasis on data in the decision-making process. Institutional leaders were able to track enrollment, revenue and financial aid trends throughout the cycle in a detailed way. Accountability was introduced so that strategic and tactical initiatives could be constantly evaluated for both successful implementation and outcomes.

It was important to create a culture of collaborative decision-making. Throughout the process, all of the key University administrators were involved as the plans were created, executed and enhanced over the years. Obviously, leaders in the Admission and Financial Aid Offices were involved. The decision-making team also included the vice president for finance, the marketing vice president and the vice president for institutional research. The chief student affairs officer participated along with directors of housing and student activities when necessary. The administrators charged with academic advising and course planning also participated. The University utilized a cross-functional Enrollment Roundtable to continuously evaluate efforts and address challenges.

Assessment-Accountability

Information and research were at the core of operations. A successful enrollment plan is a data-driven operation and University leaders relied on data analysis in all aspects of decision-making, implementation and evaluation. The University established a series of bi-weekly reports to track progress including admission funnel reports, financial aid process and expenditure reports, and momentum reports comparing weekly trends. The Communication Center produced weekly reports on calling campaigns that detailed outcomes for every campaign and type of call. A new report was developed that measured admission counselor productivity by tracking the mail, telephone and email contacts with applicants on a weekly basis. These weekly reports started out fairly simple but have been revised and expanded over the years as the plan became more complicated and we discovered new elements to review. All of these reports were shared widely around campus with all of the key administrative and academic divisions.

The reports were informative, but it was (*See A Miracle p.3*)

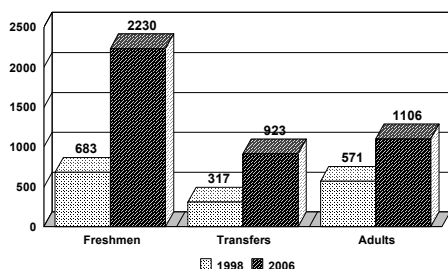
A MIRACLE CONTINUED:

more important to be able to make immediate changes in process, policies and tactics as a result of information derived from them. University leaders were able to “turn on a dime” when the data indicated a change was appropriate.

Outcomes

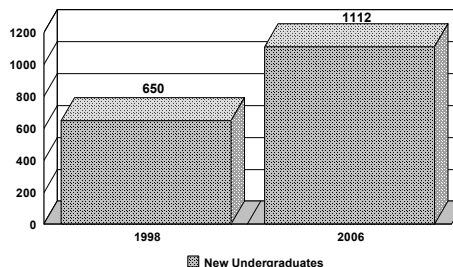
The results have been extraordinary and the good news has consistently continued for nearly a decade. Efforts to increase the number of admission applications succeeded. The number of freshmen applications has increased by 227%, the number of traditional-aged transfer student applications has increased by 191% and the number of adult applications has increased by 94% since 1998.

Application Growth
1998-2006



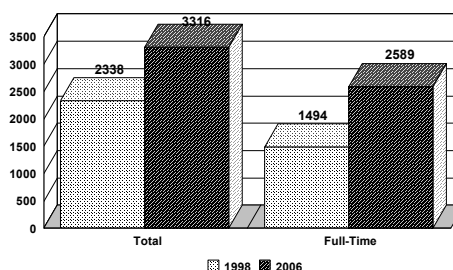
The application growth fueled dramatic increases in the number of new undergraduates recruited each cycle. The number of newly enrolled undergraduate students has nearly doubled since 1998.

New Undergraduate Students
1998-2006



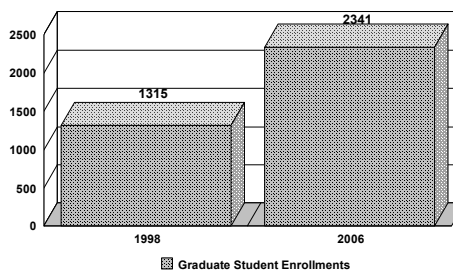
The surge in the number of new students has contributed to significant growth in undergraduate enrollment at Saint Xavier University. Total undergraduate enrollment has grown by 42% and full-time, undergraduate enrollment has jumped by 73% since 1998.

Undergraduate Enrollment Growth
1998-2006



The growth in enrollment has not been limited to undergraduate students. The number of graduate students enrolled at Saint Xavier University has increased by 78% during the same time period.

Graduate Student Enrollments
1998-2006



(See A Miracle p.4)

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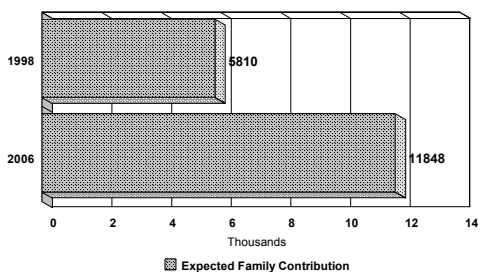
A MIRACLE CONTINUED:

The University has not only successfully attracted more students, but the academic profile of the entering students continues to improve. The average ACT score has improved by two points while the average high school grade point average of new freshmen has increased by .28. The University has nearly tripled the number of students eligible for the Honors Program.

Students are also much more likely to reside on campus. The number of students living in the residence halls has more than doubled since 1998.

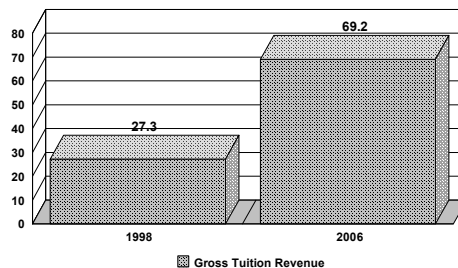
Better targeted recruitment activities combined with expanded geographic diversity has resulted in a student population better able to pay. The University has significantly increased the average expected family contribution of students. This is not to say that the University no longer enrolls needy students. Approximately 37% of the students enrolled at the University are eligible for Federal Pell Grants. The recruitment plan has not eliminated needy students; it has just provided some economic diversity to the University population.

Expected Family Contribution
1998-2006



The most important achievement has been the impact of the new model on the institutional bottom line; gross tuition revenue has skyrocketed in the last eight years. Tuition revenue has more than doubled during this period allowing the University to improve facilities, increase the number of faculty and more effectively achieve objectives in line with the mission of the University.

Gross Tuition Revenue in \$Millions
1998-2006



Financial Priorities and Leadership

Administrators in the Business Office have played an important role in the enrollment plan since its inception. As enrollments grew, difficult decisions were made with regard to pricing and management of the discount rate. Enrollment growth dictated large investments in the physical plant including building three residence halls, a convocation center, a chapel, acquiring adjacent properties and many upgrades to current facilities.

The enrollment plan was implemented in light of the institutional strategic plan. Capacity issues have been addressed throughout the years of growth facilitated by a campus master plan. Planning was necessary to achieve headcount, but sculpting the right student “mix” for Saint Xavier University was critical. Institutional leaders and members of the Board of Trustees were constantly challenged to balance investment in facilities, people and technology with debt load and general financial stability.

Two Presidents provided the necessary leadership to establish a vision and oversee the changes. Dr. Richard Yanikowski provided leadership during the first five years and Dr. Judith Dwyer has expanded upon the initial strategic objectives and continued the careful, planned growth for the last four years.

Challenges

It would be false to assert that all of this progress was achieved without challenges. The obstacles and surprises were frequent and even success breeds some problems. We experienced significant turnover in the Admission Office, hiring more than sixty people in eight years. Admission counselors progressed from handling about 100 applications each year to more than 500 applications! The enrollment growth has produced real strain on nearly every aspect of institutional capacity. (See *A Miracle* p.5)

A MIRACLE CONTINUED:

The workload for faculty and staff has increased because staffing levels have not grown at anywhere near the rate of the enrollment surge. The residence halls are bursting with students and the leaders and staff in Student Services are charged with providing meaningful co-curricular experiences for more and more students every year. Parking is at a premium and extraordinary enrollment growth has presented significant scheduling issues across the campus. Professionals in academic advising have been taxed beyond their limits. In short, enrollment growth brought about changes much faster than the ability of institutional culture to adapt.

Success has not been realized without challenges. The challenges, however, associated with extraordinary growth are more desirable than the obstacles to be addressed by declining enrollment and revenue.

New Beginnings and Valued Traditions

A new era of planning, research and change is on the horizon. The University is poised to consider core values and mission at every step in the process. It is understood that past approaches must continue to change and the University must differentiate between “tradition” and outmoded methods. Strategic and targeted change must trump “traditions” and long-held practices in order to enable core values and mission-essential objectives to succeed.

“There is hardly anything in the world that some man cannot make a little worse, and sell a little cheaper and the people who consider price only are this man’s lawful prey.”

John Ruskin

FINDING YOUR NEXT SUPERSTAR

Dr. Scott Miller
President
Wesley College

Dr. Marylouise Fennell
Senior Counsel
Council of Independent College.

Although your admissions staff is likely complete at this point in the cycle, it’s never too early to start the search for new talent. How to spot the next superstar to bring in well-qualified students who will be retained and won’t require heavy discounting to enroll? One who will stay more than a year or two, won’t experience premature burnout and has the potential to be promoted?

While your own student ambassadors and tour guides are an obvious starting point, beware of filling your permanent openings exclusively from their ranks. As a young alumnus, your current student guides will likely have only one institutional perspective, and that, from a student point of view. Can they adjust that focus to include the viewpoints of families and referral sources, as well?

One obvious danger of going directly from the classroom to an entry-level admissions office at the same college or university is that your new staffer will not know his or her “subject” well. As a student, his or her “subject” was English, or education, or business. Now, as an alumnus and novice admissions counselor, the subject to master is “your institution.” Can your new staffer transcend his or her personal student experiences to take a broader, objective view?

Finally, your new hire must be as proficient in knowing your competition as he or she is in your institution. They must not only be able to present a compelling “30-second elevator message” about your own campus, but also need to know equally well the competitive advantages of competing colleges and universities. That’s why it is often advantageous to hire a graduate of an aspirational school.

So, a word to the wise is, look beyond your own campus for new hires. The ideal candidate is someone who has mastered the “s-w-o-t” formula (strengths, weaknesses, opportunities, threats) of both your campus and that of at least one competing institution. (*See Next Superstar p.6*)

NEXT SUPERSTAR CONTINUED:

This person might be an alumnus of your school who has gone on to graduate at a peer institution, or vice-versa. A third choice might be someone who, as a consultant or vendor, has worked with a number of similar colleges and universities, including your own.

When looking for your next “superstar,” beware of candidates who say they want to enter the admissions profession because they “love people.” Obviously, you would not hire a candidate lacking in interpersonal skills. The challenge is that while a viable, long-term member of your team must enjoy working with a wide range of people, he or she must also possess many other equally important attributes, among them high energy, ability to manage details, a thick skin, perseverance in the face of frequent rejection and a strong work ethic. If your new hire offers the potential for promotion within your office, this individual will need to become conversant with market research, demographics and yes, with student financial aid formulas.

That leads us to another peril of hiring young graduates who think of endless admissions travel as “fun” and “exciting.” As the novelty of the road inevitably begins to wear off, it’s vital to make sure that the candidate’s expectations about the job are a good fit with the reality of the counselor’s position. The former cheerleader and fraternity president may be great with people, but what about the myriad details that go with the position, the arranging of appointments, the prospect research, the follow-up, the transcript review? Look for experience with task-oriented projects as well as those involving primarily social interaction.

Because turnover is costly and detrimental to team building in your shop, how can you identify those who will stay beyond a year or two? The reality is that the bright, promising young hires you seek are the same talented young graduates who will have many other options. But you can minimize turnover by giving them a reality check about the job, being honest and thorough in your job description and interview process.

While there’s no magical formula, check the candidate’s resume for continuity and commitment to one or more organizations during their college years. If the candidate played soccer and acted in the drama club all four years,

that’s a better recommendation than one who lists a dozen short-term activities. Ask direct questions of references: Is this a candidate likely to stay more than a year or two? Is he or she qualified for promotion? How does he/she handle setbacks and details?

The admissions world is replete with successful directors, deans and vice presidents for enrollment who started as entry-level counselors. Likewise, it is full of former admissions staffers who, after an initial burst of enthusiasm, could not sustain any demonstrable success. By incorporating these suggestions into your hiring plan, you can maximize your chances of finding the former and minimize the odds of recruiting the latter.

Scott D. Miller recently began his 11th year as president of Wesley College in Dover, DE, which has tripled its traditional enrollment during his tenure. He recently began his 17th year as a college president.

Dr. Marylouise Fennell is a former president of Carlow University, Pittsburgh, PA. She is a partner in the executive search firm of Gallagher-Fennell Higher Education Services.

Both serve as consultants to college presidents and boards.

Congratulations to Ferrum College in Virginia for increasing new student enrollments by more than 70% in three years!

Congratulations to Saint Xavier University in Illinois for growing full-time, undergraduate enrollment by more than 70% since 1998!

Congratulations to the University of Rio Grande in Ohio for having increased new student enrollments by more than 39% in a single year!

Congratulations to Jefferson College of Health Sciences in Virginia for their largest new student enrollment in history!

Congratulations to Ohio Dominican University in Ohio for recruiting their largest freshman class in history!

Congratulations to Tusculum College in Tennessee for reducing the institutional discount rate by 15 percentage points while increasing the number of new students!

Congratulations to Sterling College in Kansas for reducing the institutional discount rate by 8 percentage points while recruiting the second largest class in more than two decades!

Congratulations to Wesley College in Delaware for securing their largest total enrollment in history!



**Now is the time to
evaluate your recruit-
ment and financial aid
performance!**

- **Did you achieve your head-count objectives?**
- **Did you recruit the academic quality you reasonably desired?**
- **Did you reduce or at least control your discount rate?**
- **Did you meet your goals with regard to cash flow and collections this cycle?**
- **Did you recruit the class of 2011 or did you recruit your own retention problem?**



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