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AN INSTITUTIONAL REVIEW: A KEY TO WINNING THE RACE

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A new president often arrives to find the line already forming outside the office door—so many demands, so many constituencies seeking his or her ear, so little time. The crucial first six months of a new presidency must lay a firm foundation for success because the honeymoon period in higher education is becoming ever shorter. All too often, we've seen missteps at this pivotal stage prove fatal to a fledgling presidency, even with exceptionally well-qualified candidates.

How to sort out and prioritize these often-competing priorities? How to evaluate the soundness of proffered advice?

In more than 40 executive searches, the single most effective tool for a smooth presidential transition that we've found is the institutional review—preferably one conducted before the new CEO arrives on campus or within the first six months in office. Not only will a good outside review benefit a new president, but it will also offer an objective overview of the institution—warts and all—for Board members.

“Increasingly, governing boards choose to commission institutional reviews as a first step toward establishing or re-establishing more legitimate premises for the president. Boards and search committees often find these reviews indispensable during presi-

dential searches,” says Dr. James Fisher, author of *The Entrepreneurial College President* (ACE, Washington, DC, 2004.)

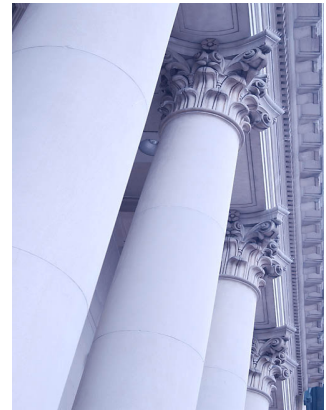
Even a model presidential search will likely provide limited information emphasizing an institution's positives, so when a newcomer to the institution - if not to the area - takes the helm, he or she may need the reality check that a comprehensive review will provide. This is true even if—perhaps we should say *especially if*—the new CEO was an internal candidate. Regardless of prior position, when a former dean or vice president moves up, he or she will continue to view the university or college through the same lens. A good review by outside experts affords a clearer focus.

Evaluating every dimension of the institution, a good review is conducted by a team of outside recognized authorities who, over a two- to four-month period, assess the condition of an institution through interviews and other data, with a special emphasis on strategic positioning. A final report should include an institutional profile with analysis, observations and recommendations for academic programs, faculty, students, administration, budget, finances and governance.

There are many advantages to conducting a review before a new president is named. For example, a review prepared in anticipation of a search process often results in changes in governance policies and practices that will make a presidency more attractive to first-rank candidates. For a newly appointed president, the review can also:

(See *Winning The Race*” p.2)

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WINNING THE RACE CONTINUED:

- ensure a better informed and more enlightened board;
- establish a tentative agenda for the institution;
- provide a more objective foundation for strategic and long-range planning;
- objectively evaluate the organization and administration, quality of academic programs, faculty and student body;
- advise on attitudes of all key constituencies; and help determine the potential for increased private support.

There are other sound reasons for an outside institutional review immediately before or in the very early months of a new president's tenure:

- it will disclose potential minefields, enabling the new CEO to avoid costly missteps at a time when the all-important first impressions are being formed;
- it will provide a full and objective knowledge base from unbiased individuals with no vested interest from which a new president may then proceed to mold an institutional vision;
- finally, and perhaps most importantly, it will often help the president handle sensitive issues, which if left undisclosed, could derail a new presidency. Moreover, it will help *protect* a new president from costly mistakes at the outset.

The cost of a professional outside review varies according to the complexity of the agenda and the size of the institution. Regardless of the amount, we have found that this money is well spent as an investment in the institution's future success. At least, it will help prevent costly mistakes and premature turnover; at best, a review will serve as a transformational vehicle for the entire institution.

"A good review is usually far more valuable than even the most thoughtful self-assessment," Dr. Fisher says.

Strong beginnings start with sound planning at the outset, and there is no better tool than an institutional review. Therefore, we urge boards and new presidents to begin this process sooner, rather than later. With the possible exception of building a strong Cabinet, no other first steps will serve a new CEO so well throughout his or her entire tenure.

Dr. Scott D. Miller is beginning his first year as president of Bethany College in West Virginia. He is entering his 17th year as a college president. Dr. Marylouise Fennell, a former president of Carlow University in Pittsburgh, PA, is senior counsel for the Council of Independent Colleges (CIC.) She is also a partner in the executive search firm of Gallagher-Fennell Higher Education Services. Both serve as consultants to college presidents and boards.

UMBILICAL CORD RE-ATTACHED?

Shirley Arnold
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Many parents of today's college students are Baby Boomers. So are many of us who work in higher education as faculty members and administrators. So it seems we should have a good point of entry into understanding our contemporaries' approach to parenting. Yet, instead, our expectations of our students seem dramatically different!

Students today often tell us that their best friends are their parents. While we may assume that the student with the cell phone glued to his/her ear is talking to a peer, we should probably think again. The conversation partner is very likely a parent. Why is this so surprising to us? Communication between students and parents has grown significantly as indicated in a Middlebury College poll taken in 2006.

As Baby Boomers, many of us were taught to be independent thinkers and to accept the consequences of our independent thinking, whether such thinking related to our choices about hair length, drug use, or political involvement. Consequently, we find it challenging to deal with students who seek constant guidance from their parents before making the slightest decision. Our challenge is compounded by the fact that when the students do think independently and make poor decisions, their parents do not seem to expect them to take responsibility for their choices. Rather, parents often find us as college administrators or faculty to be at fault instead.

Those of us working in academic affairs in small, private, liberal arts colleges walk a tight (See *Umbilical Cord* p.3)

UMBILICAL CORD CONTINUED:

rope to meet the expectations of both students and parents in today's world. The students, the so-called "millennials," continually challenge ways of teaching and discipline aimed at moving them toward young adulthood, toward making sound decisions and accepting consequences for their actions. How confusing it is for us, then, to talk with parents who blame us as individuals, or "the college" in general, for their students' predicaments. When I hear such ready blame for anyone but a student him or herself, I feel as if the parent's umbilical cord has been reattached. "Umbilically-connected" parents are text messaging, emailing, leaving wake up calls, setting strict schedules, editing papers and heaven knows what else, seemingly intent on protecting their offspring from the consequences of their own actions.

If there is any comfort to be had in this scenario, it is that the College where I work is not the only institution experiencing this strange phenomenon. Rather, the umbilical cording of parents and students is happening in colleges and universities across the nation. The re-attachment does not seem to be related to economic or educational background; it occurs in families with privilege and ones without. Why? Principally, because parents want the very best for their children and are willing to go to any lengths to procure it—even to the point of negotiating job details following graduation!

In response to this situation, those of us who work in administration may need to take on a new role: educating not only the millennial student, but the Baby Boomer parent as well. Karen Coburn agrees. She writes that

"Colleges and universities throughout the country are taking creative steps to enlist today's involved parents in ways that promote—rather than thwart—student development and engaged learning." Getting the parents onboard will be a key to getting students to emerge as successful young adults when college graduation arrives.

Another key is ensuring that college leaders are involved with this restructured educational process, including enrollment officers, campus life staff, academic affairs staff/faculty, current parents, and current student leaders. Involving all of these groups will allow for all views to be heard and examined. At the very least, a cross section of the campus needs to be enlisted to brainstorm ways to address the issues that are arising with today's students and their parents. The ideas that emerge can then be put into a pamphlet to be shared with parents as part of orientation. I'm convinced we cannot assist the "millennial" students with their education toward independent and mature thinking unless we find a way to have parental buy in.

Unfortunately, we cannot wave a magic wand to detach the umbilical cord when it has been there for over 18 years. I do believe as educators we are obligated to educate today's parents as well as their students. The challenge in doing this will not be easy but the rewards will be amazing for everyone. I believe we owe it to our students, our parents, and ourselves.

TACKLING THE E-MAIL STUDENT PROSPECTING CONUNDRUM

April Clark
CAS

There are many successful ways to market via e-mail. I will discuss some of those methods in this article. There are also pitfalls that await your e-mail marketing campaigns. It is important for college marketing departments to be aware of these stumbling blocks – it may save you from some headaches further down the road!

The first pitfall is incorrect e-mail addresses. There are a number of competent e-mail append and e-mail prospect vendors out there, the secret is finding one that can give you what you need – accurate, (See *Tackling The E-mail p.4*)

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TACKLING THE E-MAIL CONTINUED:

opt-in e-mail addresses. In addition, you must always be on the lookout for opportunities to “capture” e-mail address information from your students and prospects.

The process of adding e-mail addresses to your student prospect records is not complicated. There are a number of steps you can take to achieve your goal of adding e-mail addresses (and telephone numbers) to your databases.

The first step is to find a vendor that uses opt-in databases. You may want to find one that adds e-mail addresses, as well as telephone numbers to college and university databases. One way to find this vendor is to ask your colleagues for a referral. CAS is such a vendor. We offer both e-mail and telephone append services to our many college and university clients.

The second step is to contact your chosen vendor and talk with him/her about your objectives, and inquire about the scope of the services offered. You will want to ask if they offer more than one pass as e-mail databases are often limited to several sources. This means they will “pass” your student database by more than one e-mail database – thus increasing the number of matches. Often you can double the number of your matches simply by using multiple passes.

One situation you will run into - if your database is small, minimum append fees can be high.

Your vendor may suggest doing some file hygiene on your database as well. If the name and addresses have not been run through the National Change of Address system of the US Post Office in the last six months, you may want to invest in that service. Updated addresses will result in a higher match rate for both e-mail and telephone appends.

The third step is the creative process for your message. The e-mail append vendor will be sending out your first message as part of the append process. This is called the opt-out or permission pass. It gives the e-mail recipients the opportunity to opt-out of receiving your future messages. This message is important because people that do not opt-out, give you permission to contact them via future e-mail messages.

It is important that this message be inviting and let them know the wonderful things they will be getting from you (i.e. newsletters, financial aid information, marvelous and exciting messages... you get the picture!) This message also saves you money because this opt-out “welcome message” is used to eliminate hard bounces (non-deliverable) and non-interested

prospective students. You should not be billed for opt-out and non-deliverable permission matches. Be sure to ask your vendor if this is their policy.

The fourth step is also very important. After you receive your prospect or student database back from the append process, you MUST send out a connecting e-mail to all the addresses. By connecting e-mail, I mean to tie them to you and get them expecting to receive your wonderful messages. The other purpose to sending out an immediate message is that you will reach them before they change their e-mail address. You will find that e-mail addresses change quickly. If you wait longer than a week, the undeliverable addresses will increase exponentially. Even if you send your message out within a week, you will get some undeliverables back, but it should be a low number, less than 10%. If you wait, say a month, the number will be more like 25%. So this is a critical step.

Now for some discussion on how to collect e-mail addresses for your database. You should set up "links" to your School Website. Be sure it is easy to link to your website. You can set up link contact e-mails for different questions from prospective students with different landing pages. Please be sure it is easy for them to navigate and find answers. Always ASK each person who logs onto your website for their e-mail information and be sure you are saving that information.

Here is a little more on your e-mail messages. You might like to try these related ideas. Since imitation is the sincerest form of flattery - check out your competitor schools' e-mail programs to see what they are doing. Remember that relevance ALWAYS "trumps" frequency – so make sure that your messages out to your e-mail database are always worthwhile – don't waste their time, or you will definitely lose them. It is wise to understand your audience, and deliver on that understanding by communicating in a media and language your students understand, being sure your e-mail program reflects their behavior by tuning into their interests. Be sure to use your offered curriculum programs as key words in "pay per click" - being sure to use current vernacular descriptions. It is always wise to use personalization methods to make each message relevant to each prospective student.

One “trick of the trade” is to ALWAYS ask them additional information about themselves each time you “touch” them and use it effectively. For example:

(See Tackling The E-mail p.5)

TACKLING THE E-MAIL CONTINUED:

- please verify the name and address we have for you
- or add your phone number here
- or what course(s) of study might you be considering
- or are you interested in living on campus or off
- or what are your extracurricular interests, etc.

You must be sure to capture each piece of information and use this information in your next communication with that student. For example - "Susan" told you last week that she wants to join a swim team -so the next week's e-mail has a message from your swim team coach that says " Susan - we wanted to tell you about the tryouts for....." This is called "triggered messaging" and can be automated by setting up specific rules for responding to information provided by prospective students. You can see how powerful this can be in persuading them to commit to your school!

Another idea is to add a picture and short bio of a current happy student who is in the program they are interested in - add a link to that student's e-mail address and encourage them to ask that student questions to start a mentoring relationship.

The mechanics of this communication would involve your IT people, but the basics would be to set up standard, generic information to be sent in a message. Then the variable personal content is loaded in a staging area or library, and finally the rules are established to have the greatest effect on each prospective student. If program interest is X, then insert the piece of information Y. You will work with your technical department on the details.

Here are some ideas on the Frequency of E-mail Channel Contact:

- quantity does not reflect quality, you must always have something relevant to say before e-mailing
- send out a series of Welcome to XYZ University messages, each gathering a new piece of information
- then send several triggered responsive, personalized messages working off the new pieces of personal information
- add personal touch messages from an assigned mentor in the prospective student area of interest

-track any indicated interest on the part of the prospective student such as clicking through to your website or responding back to mentoring student; responses should trigger a telephone call or other channel contact, so be sure to provide them with multiple channels of response from text messaging to telephone numbers.

It is a whole new world out there, and you can take advantage of the new channels of communication with careful planning and attention to the details of your new age marketing programs.

EFFECTIVELY UTILIZING PRIVATE LOANS TO SUPPORT RECRUITMENT AND RETENTION

John W. Dysart
President
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Over the past year, much has been published in the media about the student loan industry. Specifically, there have been many headlines over the course of the year that discuss how private student loans, funds provided by educational lenders, have grown into a \$17 billion a year industry and how lenders are directly communicating with consumers to secure educational funds to pay for college because of the decline in subsidies for Federal loans. Further, the costs for higher education continue to rise and federal and state support in the form of financial aid has simply not kept pace. The gap between what traditional financial aid covers, and what college costs increases every year. This is particularly true at private colleges and universities. Students and families are increasingly turning to private loans to fill the gap.

Colleges and universities must still provide students educational financing options so that they can enroll for classes for the first semester and thereafter. As college financial aid offices start to leverage private loans to bridge the gap between traditional financial aid and the cost of higher education, it is important for college administrators to look at such private loan products and consider how these products support the areas of

(See *Private Loans* p. 6)

PRIVATE LOANS CONTINUED:

recruitment and retention.

When you think about loan products, accessibility and flexibility are critical factors because as a school, you will need a loan product that will be available to a high percentage of your students. Private loans may not only enhance your existing packaging strategies, but also be used for study-abroad programs, adult programs, on-line programs or to entice “stop-outs” to pay back balances and re-enroll.

Thus, how do you know if you have an accessible and flexible product? Here are some quantitative questions to consider asking as you examine the accessibility and flexibility of the product you are evaluating:

Question: What are the eligibility requirements that a borrower must meet to be approved for this private loan?

This question is essential in determining whether or not you have a flexible loan product that is intended to be accessible. It is important to understand that lenders use eligibility requirements as a way to mitigate default risks. However, the more requirements that the student must meet; the less accessible the product will be. As a result, the ability of a student to obtain a gap finance tool to enroll for the semester is affected. Examples of requirements include but are not limited to: income or residency requirements, a certain number of lines of established credit or no derogatory credit which would include: bankruptcy, charge-offs, or late payments. As you consider the lender requirements, think about your students and whether or not they would pass such requirements.

Question: What is the FICO range for the private loan product?

Understanding the FICO range allows you to determine whether a product is intended to be accessible to a broader range of students. It will help you determine if the product might be limited to a small segment of borrowers with “great” credit or if it is an accessible product that is available to a larger segment of borrowers along the FICO band (0 to 850). The median FICO of the average borrower at the national level is approximately 723. Many traditional, commercial private loan products will be available to individuals in 660-723 range; but they will not lend to individuals with sub-prime credit. Sub-prime credit is credit that is south of 659. If a lender does have a product that is available to borrowers with sub-prime

credit, the student or family will probably pay a price (greater interest rate and or fees) for their less than stellar credit. However, in most cases, a private educational loan is still a better option than more expensive methods, particularly credit cards. Strategically, it is to your advantage to leverage a product that is the most accessible to the most students.

Question: How easy is it to apply for the product?

Ease of application process by website or by telephone is critical because you want students and families to receive a decision about whether or not they can count on the loan(s). More importantly, if the student is approved, you want an application process that is capable of providing the specific terms of the loan (interest rate, APR, fees) immediately upon approval. If the student can receive an online loan decision quickly, he/she will be more likely to make his/her “educational purchase” (i.e. pay for tuition, dormitory, books, etc...).

In the upcoming year we are likely to see a large increase in direct to consumer (DTC) marketing by lenders. Increasingly your prospective students and families are going to look to your institution for guidance on private loan options. It is important for the school’s financial aid office to adequately assess the best options available to bridge any funding gaps that your students may have. All in all, as more private loan products are introduced in the financial aid market place, it will be critical for administrators to look for products that promote accessibility and flexibility, as these attributes are essential for helping to enroll and retain students.



TIME TO ASSESS PROGRESS

John W. Dysart
President
The Dysart Group, Inc.

As the new year begins, it is time to evaluate your progress with your recruitment plan and make any necessary adjustments. There is still plenty of time for success!

Check the size of your inquiry pool. Does it appear sufficient to generate the number of applications necessary to meet your recruitment goals? A good rule of thumb is to assume you will need approximately ten inquiries to generate an application. If your pool is inadequate, consider strategies to increase the number of inquiries such as conducting additional searches, visiting more community colleges, expanding high school visits and college fair events or initiating advertising.

Check your applicant pool. How does it compare to the same time, last year? If you are running behind in the number of applications, take additional steps to secure applications. Consider revving up communication with your prospective students in the form of campus visits, telephone calls, e-mails or text messages in order to encourage applications.

Compare your enrollment deposits to the same time last year. Have you realized an increase? If not, you will definitely need to improve communication with your admission applicants. Consider involving campus personnel outside of the Admission Office in the communication process. Make sure you are providing your accepted applicants specific benefits for sending deposits.

Is your Financial Aid Office ready for the cycle? Award letters should have already been mailed to both new and returning students. While it is unlikely that large numbers of students have applied for aid at this time, anyone who has applied should have received an award.

It is still early, but enough time has elapsed for trends to be set. Take a detailed look at your enrollment numbers now and do not be afraid to implement new initiatives or make significant changes in order to improve your chances of achieving your enrollment objectives.

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