

ENROLLMENT MANAGER

VOLUME 5, ISSUE 2 APRIL 1, 2009

SAVING *GREEN* BY GOING GREEN IN HIGHER EDUCATION

Michael A. O'Grady
Vice President for Sales
Overture Technologies

I remember about 17 years ago, I was attending a university-wide "town-hall" meeting at a large state university where I was working in financial aid and admissions. All faculty, staff and administrators of all levels were required to attend. As usual the president held forth and gave accolades to those aspects of the university he thought were going well, and forcefully admonished those he believed weren't. The routine was always the same. The president would welcome questions after the admonishment and there would be the usual dead silence. And just as everyone thought they were safe and could dash to lunch, a faculty member, academic faculty that is, would raise some ar-

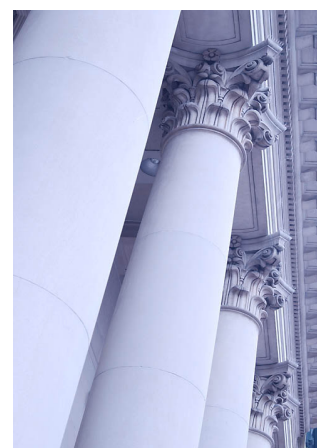
cane question about the direction of the curriculum or about a change in a retirement plan. The next question was always from some staffer eager to throw a compliment to the president disguised in some fluffy question.

In one of these sessions, the president pointed out that university-wide we were making a huge amount of Xerox copies, and he wondered if they were all necessary. Next he went on to other budget matters that needed to be contained due to budget cuts. The new street lights that were just installed for safety? Well, they would have to be turned off at 10 pm to save electricity. Lastly, he pointed out the high cost of machinery around the campus including numerous copy machine repairs. As expected, the question (*see Saving Green p.2*)



Some members of the enrollment team at Roosevelt University in Chicago clarify the unprecedented increase in freshmen enrollments for Fall 2008.

ENROLLMENT MANAGER is a publication of Dwyer Education Strategies, Inc. Inquiries and comments can be emailed to dwyereducation@aol.com. An electronic version of the newsletter is available at www.dwyer-educationstrategies.com.



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THIS NEWSLETTER IS PRINTED ON 100% RECYCLED PAPER.

SAVING GREEN CONTINUED:

and answer section followed. A faculty member asked some perfunctory question about retirement benefits; the high level staffer hid his compliment in a fluffy question. I couldn't resist breaking the unwritten two question rule. Despite a death stare from my Provost, I stood up to ask the obvious question: I said, "In light of the out of control number of copies we make at the university, why don't we just not fix the copiers?" There was dead silence of course, although I could almost hear my colleague's thoughts on whether they could take my precious office with a window that opened. The president seemed taken back. There was dead silence in the auditorium, until the president broke out in his larger than life laugh, and we all joined in as if on queue.

Well 17 years later we are still facing budget cuts and are probably still making too many copies. However, our university presidents are *not* laughing. The national economic flu is hitting our universities and colleges and is going to get much worse. With the exception of the "for profit" sector, higher education institutions will have to make comprehensive cuts in their budgets. This will create a precarious balancing act between meeting recruitment and retention goals despite fierce competition from cross-applicant schools and on-line competitors, keeping the quality of campus life and maintaining a sound infrastructure. "Going-green" you would assume will have to wait. Our presidents aren't waiting though; the American College & University Presidents' Climate Leadership Summit or ACCUPCC has blossomed to over 550 signatory institutions representing four and a half million students. In short, campus leaders (that is you) are going to have to create a plan that meets the confluent needs of doing more with less---and consuming less but creating more...make sense?

Although my daughter is only 14, we decided to take her to a large college fair that was in town. I was surprised how little had changed in the 27 years I have been in higher education. Most notably, large booklets and brochures on admissions and financial aid were being passed out by the box loads to thousands of parents and teenagers as they meandered by the booths. No particular match---everyone met their goal for the night. Prospective students picked up lots of stuff to impress their parents, and admission reps didn't have to carry heavy boxes back to their rental cars.

I told my daughter to stop picking up the booklets and just make notes. I knew she wasn't going to make any decision

based on the booklets (let alone read them)—she was going to choose her college the same way she recently made the most important decision to date in her life. That is what type of dog to get. Actually it was both my daughters' adroit use of the Internet that helped them overwhelm their parents with proof that a particular breed could overcome all of our objections on why we couldn't have a dog. The objection we couldn't overcome came from Internet research that stated the dog's life expectancy would not exceed the timeline for my kids to go to college. (Who ever thought a four inch dog with the bladder of a bull existed?) Bottom line: my kids are going to choose a school the way they chose "Rusty."

Changing the paper paradigm in admissions and financial aid isn't going to be easy. All stakeholders will invariably make the case that *their* paper, whether it is an inquiry card or a financial aid award letter, is essential to the recruitment and retention process and therefore the financial health of the institution. To these stakeholders I would quote Marshall McLuhan's famous edict that "the medium is the message." I recently had a colleague mention how her niece received a huge package of information in the mail from a "prestigious" university upon being admitted, including the university's "point of sale"-- the award letter. Her immediate response was how behind the times they were. "They claim to be hi-tech and I get this?" was her niece's retort. So are we actually turning off prospective students, communicating ineffectively, and killing trees, while paying more to do so? Yep.

The financial aid award letter would be one such example. Being admitted is important to a student, but the admission letter has no life until it is plugged into the financial aid award letter. Often the receipt of an award letter creates more questions than it solves, and in today's tough economic environment that isn't a good thing at your university's "point of sale." To make matters worse, the tasks of printing, packaging, stuffing envelopes, mailing and handling, phone calls and award follow-up cost a university approximately \$25.50 *per* student. If you multiply your student population by \$25.50 you would probably conclude that that chunk of change could be used to communicate the affordability of your education more wisely. If your existing financial aid management system can send awards electronically that is only half the battle. The existing capabilities of your system may be able to cut the paper and mailing costs, but the expense and time-consuming nature of inbound phone inquiries may not be mitigated without more robust

SAVING *GREEN* CONTINUED:

“counseling” automation in your soft- (see *Saving Green* p.3)

ware. This is just one example of where “going-green” is not at odds with spending less. In fact, your university probably has multiple opportunities where less money could be spent, if it was spent *differently*, and *efficiencies* in recruitment and retention would result.

As for all the plastic brochure racks you have cluttering your offices? Have a team building exercise. Get some GHIA pet planter seeds, fill the racks with top soil, and have a competition among your staff on who can make the racks greener the fastest. As for the postman who shows up with a paper admit and award letter?.....Rusty will be waiting.

Michael O'Grady can be reached at
mogrady@overturecorp.com

FINANCIAL AID CALCULATORS: A TOOL TO LEVERAGE YOUR AID DOLLARS

Bill Smith
President
Think Ahead, LLC

Curavo & Associates

*Experts in Website Design, E-commerce and
Management*

Alexander C. Curavo
President

27100 Oakmead Drive, Suite 136
Perrysburg, OH 43551
Toll-Free: (866) 272-7256
acuravo@curavo-associates.com

Web-based financial aid calculators have been available for several years, and many colleges have incorporated them into their outreach and marketing programs. Other colleges have avoided them, fearing that the posting of a financial aid calculator will open a Pandora's Box. Aid officers sometimes fear calculators will create questions for users, resulting in increased call volume to explain calculator results. Others are concerned they'll bind their hands, creating the expectation of an unofficial commitment to prospective students. And some worry that their aid packages will appear meager when exposed via a calculator.

With the passage of the HEOA, signed into law in August 2008, financial aid calculators are receiving renewed attention. As part of its transparency provisions, HEOA charged the Department of Education with developing a Net Price Calculator within a year of signing, and two years after that, by August 2011, all colleges will be required to have net price calculators on their own websites. So ready or not, online calculators will soon be a part of every college's reality.

Should colleges be concerned about the calculator requirement? Does the calculator requirement represent an opportunity for colleges instead of just a burden? First we'll look at the traditional concerns aid administrators have had about calculators to see if perceptions of their downside are justified. Then we'll consider their potential for positive impacts on your operations.

Does a calculator create more questions for users than it answers? It's a legitimate concern – no aid officer wants to add to their office's already busy workload by having additional calls and questions coming in from families who don't understand the information a college provides on its website.

A well-designed calculator should answer more questions than it creates. Year after year studies show that financial aid and tuition calculators are consistently ranked by high school students as among the features they most value and want to see on college websites. It stands to reason that including a calculator that provides the information students want will result in fewer calls, not more. In fact, statistics shared by Yale University at a recent College Board Forum showed that call volume to its financial aid office declined after it posted an online calculator in the summer of 2008. Call volume from October 2007 to October 2008 actually fell, although applications for aid increased, and the general economic climate deteriorated significantly over the same period.

Does a financial aid calculator create unrealistic expectations for users? Will they expect their final aid package to look like what they see on your calculator? It's important to qualify a

FINANCIAL AID CALCULATOR CONTINUED:

calculator by including a statement that the calculator's results are an estimate, and that the determination of the financial aid office based on receipt (*see Financial Aid Calculator p. 4*) of verifiable documentation will be the deciding factor in actual aid awards. Obviously the quality and accuracy of the data entered by the user is critical in getting an accurate result, and your message should inform users of that. Providing good explanations and help messages within the calculator can go a long way to helping guide users through the data entry steps. The treatment of income and asset items for financial aid can be baffling for families – the more your calculator can demystify the needs analysis, the better.

Your calculator will be most effective if it gives a realistic portrayal of the aid a student is likely to receive. That way a family that enters its information accurately can be reasonably confident of the general amount of financial aid they'll receive. In that sense a calculator will lead to expectations. If the calculator is flexible and well designed, the expectations won't be unrealistic. Colleges often build ranges into their calculators to provide flexibility – and still have actual awards that are consistent with their calculator.

Will a calculator emphasize small awards, driving prospects away? Perhaps – so the key is to use your calculator to focus your aid toward the prospects you want to apply, then attend and retain. Incorporating a merit aid element into your calculator allows you to direct aid toward prospects whose GPA or test scores make them desirable target students. You can also direct aid to students in desired geographic locations. Colleges can allocate more of their tuition discounting towards students they want to attract. Over time you may be able to lower your discount rate while improving the demographic and academic profile of your student body.

We've discussed the potential negative aspects of calculators and how to address them. *What are the positive reasons for adding a calculator to your site?*

It's the kind of information prospective students want to see. If they can find it on your site, they're going to stay and learn about other factors that set your college apart. The longer you can keep a prospective student engaged on your site, the better your opportunity to connect with that student.

It can be a tool to collect data on the people using your site. By including a form within your calculator you can collect demographic and financial information from your users. Including

an offer of a Financial Aid Resource Packet can be a valuable incentive to encourage prospects to use your calculator and submit their data to you. Once you've gotten user information you can establish a dialogue with prospective students. The information you collect can also tell you who is visiting your site and how they are using it.

A good calculator can give you a competitive advantage relative to other colleges your prospects are considering. A calculator that's easy to use and gives users specific information is much more valuable than a link to a generic free calculator. If your calculator gives users information tailored to their circumstances, they'll get valuable feedback – specific answers to the questions that matter to them. Calculators that deliver non-specific aid ranges based on broad income, asset, or EFC brackets will be far less valuable to prospects.

A calculator can be an important tool in your overall marketing program. By targeting aid to the prospects you want to apply to your college, you can leverage your financial resources. Letting prospects know that they can benefit from your aid packages is important. How better to let them know than by showing them what their benefit can be? "If you're an A or B student, our college has financial aid programs that can benefit you. See what they can mean for you by checking our financial aid calculator." Unless your target market knows what your aid packages mean for them, you won't be getting the full value of your marketing message.

Online calculators are going to be a fact of life. By choosing a calculator that can provide a realistic portrayal of a student's likely aid, you can turn the DOE requirement into a net benefit for your college. A calculator demonstrates that your college will provide information your prospects want to see. It can be an important way to collect data on your target market. It can give you an edge relative to your competition. And it can demonstrate that the prospects you most want to attend will get a better package. A calculator isn't a silver bullet, but it can be an important part of your communication toolkit, helping you move toward such goals as marketing your college, improving your application, admission and retention metrics, and influencing your discount rate.

Think Ahead LLC develops customized financial aid calculators for colleges. You can contact Mr. Smith at bill@collegeaidcalculator.com.

GROWING ENROLLMENT WITH STUDENT HOUSING

R. Kent Dussair
President
CDS Market Research

When choosing a college, price and reputation are not the only student and parent considerations. Comfort level, location, size, diversity, academics, campus life, athletics, extracurricular activities, facilities and technology resources are also factors. When considering campus life, student housing along with eating arrangements and the social environment have to be weighed. Housing is an important component of attracting qualified students to a college and should be regarded as a tool for recruiting students at all levels, including undergraduate, graduate, international, exchange and transfer. Student housing provides safe, secure and stimulating environments that are conducive to students' academic success and personal growth and fosters a sense of community, civic responsibility and an appreciation of the diversity of the university community.

In an effort to compete for students, colleges and universities across the country are making substantial campus improvements, in part by adding enhanced housing and amenities. The type and quality of amenities offered in student housing is a primary factor in attracting students to on-campus housing. In the 2002 survey of housing satisfaction, Education Benchmark, Inc, in partnership with the Association of College and University Housing Officers, determined that one key priority predictor that most influenced students' overall satisfaction was the school's housing program. "The American Freshman — National Norms for 2006" found that 66.9% of all freshmen interviewed ranked the overall quality of campus facilities as the sixth criteria for choosing a school.

College students are increasingly becoming more demanding when it comes to student housing. They are rejecting traditional "dorms" and demanding the amenities they have grown up with and expect on-campus housing to rival anything that can be found off campus. The expectations are higher than ever and residence halls can be a "make or break" factor for students. Students expect more sophisticated housing options such as private bedrooms and baths, Internet connectivity, ATM machines, fully equipped kitchens, spacious living areas, resort-style amenities and col-

leges and universities are catching on. They now know that to recruit and retain students, they must offer modern living/learning communities that support their academic mission.

According to College Housing Report, 2008 by College Planning and Management, student housing amenities in approximately 90% of today's residence halls include air conditioning, card access for security, Internet access, kitchens, laundry facilities and study/casual lounges; over 70% include vending machines and TV rooms; 50% have video surveillance and carpeting; 30% or less have classrooms, dining halls, fitness centers and computer centers. As seen in CDS market feasibility studies, newer student housing projects developed by both universities and private developers are incorporating upscale amenities found in apartment style living including larger floor plans, hardwood floors, fireplaces, washer/dryer in each unit, business centers, basketball courts, sand volleyball courts, fitness centers, movie theatres, tanning beds, resort pools and retail such as restaurants and coffee shops into their properties.

Purdue University is opening a new "residence hall" this year with upgraded amenities. According to The Director of University Residences, Barbara Frazee, the popularity of the new facility will boost the university's annual renewal rate and keep more students on campus for more of their undergraduate years. "Our job is to anticipate and respond to what the students, or customers, want and need," she said. "Students choose to live with us because we are providing options and services that augment their entire Purdue experience."

According to the College Housing Report 2008, 100% of the universities felt that the quality of their residence halls had an influence on student recruitment and retention. 74% of the universities agreed that the major concern for the next five years is the changing expectations of students. Not surprising, 87% of the institutions polled have a mechanism for soliciting student input when planning a new residence hall or remodeling an existing one.

College enrollments have increased 18% from 2000 to 2007 and are expected to continue to increase at a rate of 20% over the next five years according to a sampling of the most recent student housing feasibility studies conducted by CDS Market Research. Approximately 20% of all students enrolled in universities are living on campus and the average occupancy rate is at 99%. As seen in our research, many upper classmen are opting to live on campus as well as incoming freshmen.

As enrollments increase, the demand for student housing increases also. As seen in CDS (*See Growing Enrollment p.6*)

GROWING ENROLLMENT CONTINUED:

studies, some universities are losing new recruits due to the lack of student housing and or the age and condition of existing housing. The greatest challenge many recruiters face is the lack of housing in general and especially the sought after amenities found in newer “apartment style” facilities as opposed to the traditional “dorm.” To attract the most qualified students nationally, most recruiters agree on-campus housing is a requirement. As seen in our studies, some universities are turning away as many as 300-400 students every semester due to the lack of housing.

Assessing the need and feasibility for student housing as a means to bolster enrollment is a task which many universities have turned to consultants for help. The process involves an independent assessment of current housing conditions, a thorough analysis of dynamics influencing campus life and culminates with recommendations for a market-supported course of action to meet future housing needs. Methodology can include on-site field analysis of existing housing options, student surveys, interviews with real estate professionals and campus administrators and review of enrollment and other existing data. Supply and demand measurements should be carefully evaluated in terms of student demographic segments as they relate to optimum timing for the appropriate type of housing and to housing locations.

Kent Dusair is President of CDS Market Research. For more information contact him at kdussair@cdsmr.com or visit www.cdsmr.com.

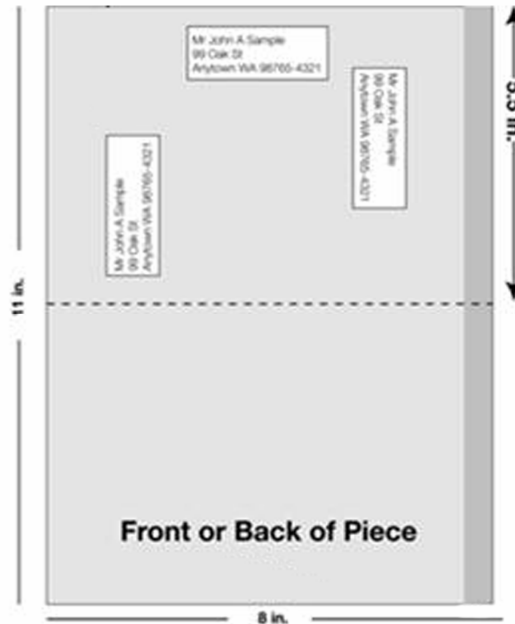
NEW POSTAL REGULATIONS

Kathy Allie
Production Manager
Premier Communications

Two new mailing requirements recently instituted by the United State Postal Service have the potential for dramatically increasing postage expenses. First, the postal service has tightened address placement requirements for flat-sized pieces. For most Admissions offices, these include

viewbooks as well as other types of catalogs and brochures.

As can be seen from the diagram below, the post office has its own unique definition of the top of a mail piece as the “shortest edge”. New addressing standards require that the recipient’s name and address be in the top half in one of



the three directions shown (it cannot be upside down). The font used for the name and address must be at least 8-point. The USPS prefers that all capital letters be used, but it is not a requirement. The postage or postal indicia and the return address must be aligned in the same direction on either side of the address. Postage must be to the right and return address to the left in the same direction as the address in the top half of the piece.

In determining the top of an envelope, the position of the sealed flap does not matter. However, for a bound piece that is mailed stand alone, such as a viewbook, the top has an additional definition. For bound or folded pieces, the spine or final fold must be to the right of the “top”, or shortest edge. This is depicted by the shaded area in the diagram above.

Failure to meet these address placement standards mandates that no discount can be given by the USPS for postage, including the loss of non-profit postage. In other words, all flat-sized mail that does not adhere to these placement standards must be mailed first class. This increased postage expense can be costly. For example, a stand-alone viewbook that Premier mails for one (see *New Postal Regulations* p.7)

of our clients costs \$0.41 if mailed non-profit and \$1.51 if mailed first class – nearly four times the postage cost!

As Spring approaches, most of you will be re-printing viewbooks, envelopes, and other mail items. You **MUST** ensure that these reprints meet the new USPS address placement standards. In most cases, this should involve only minimal re-design of your mail pieces. We made our clients aware of these pending changes over a year ago so that they are already in compliance. However, we have since taken on new clients that stocked up last year with a two or three year's supply of certain items. We have been able to successfully petition the local postmasters in our several company locations to "grandfather" the old incorrect materials for a certain period of time. We were allowed to do this as the USPS knew that we were proactive in implementing these changes, but there is no guarantee that you will be afforded the same leniency by your post office.

The second new requirement recently implemented by the post office regards address correction. New guidelines require that all mailing lists for items that receive a postal discount be move update verified within 95 days prior to the mailing. There are several methods by which this can be accomplished to the post office's satisfaction. They include verifying your lists against the National Change of Address (NCOA) database, the use of "FASTforward" technology, or the USPS's ACS Service. Whether or not you prepare your mail on-campus or use a mailing service, you should make sure that this move update correction is being performed on your lists.

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