

ENROLLMENT MANAGER

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THE OBSTACLE TO RETENTION AND GRADUATION NO ONE TALKS ABOUT

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If the majority of your enrollments are first-time freshmen, this is an issue you are unlikely to confront. If your institution, however, recruits and enrolls a large number of adult students and/or transfer students, federal and state financial aid lifetime maximums are probably going to impact the ability of many new, prospective students to enroll. Further, it could serve as a substantial barrier for your currently enrolled students to continue enrollment and/or graduate.

Students in this country often elect to transfer to another college or university. Students decide to transfer for a variety of reasons:

1. Lack of Academic Success
2. Financial Problems
3. Changes in Major
4. Job Loss
5. Family Difficulties
6. Social Fit

Regardless of the reasons, the numbers are significant. Studies indicate 37% of students transfer to other institutions. The COVID-19 pandemic is likely to increase transfer rates further over the next year or two.

The issue is compounded when students transfer multiple times. Nearly half of the students who transfer (45%), will do so more than once.

The challenge, particularly for transfer students, is that taking longer to graduate increases the probability of reaching lifetime financial aid limits. It happens more often than you might think.

For the neediest students, there are lifetime limits on Federal Pell Grant eligibility. Essentially, Federal Pell Grant eligibility is limited to six years for full-time students.

Student lifetime borrowing under the Federal Direct Loan program is limited by federal regulation. Aggregate borrowing limits for “dependent” undergraduate students peak at \$31,000.

Borrowing limits also apply to independent, undergraduate students. Their maximum is \$57,000.

It is easy to see how some students might reach their aggregate limits due to poor academic advising, changes in major or lack of academic success in particular courses. Students can encounter difficulties even while attending a single college or university.

Aggregate limits are not just a challenge with federal financial aid programs. Most of the states impose similar limits on state-funded scholarships and grants.

Aggregate limits are much more likely to occur for transfer students; even courses successfully completed at another institution may not apply toward a degree at a new institution.

For the new students who require financial aid in order to enroll at your institution or continue progress toward a degree at your institution, lifetime limits can serve as a real barrier making it impossible for many students to complete their education. The negative impact of such limits hurts colleges and universities as well, as revenue is lost when students are unable to initially enroll

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THE OBSTACLE TO RETENTION AND GRADUATION CONTINUED:

or begin a program but are unable to complete. In addition, retention and graduation rates are reduced.

Your institution may be facing this issue and it is possible that senior leadership is unaware. Take a few minutes to touch base with your Director of Financial Aid to find out if you are losing new students, or failing to retain currently enrolled students, due to lifetime maximums.

What Can Be Done?

Most colleges and universities have no strategies in place to deal with this issue. If your institution recruits a large number of transfer students, there are some steps you can take to help them.

Improve Academic Advising

The most effective thing you can do to reduce the number of students facing aggregate financial aid maximums is to improve your academic advising. Often, the problem is caused by well-meaning academic advisors who may be versed in the requirements for particular majors but are just not equipped to understand the details of how course selection can negatively impact financial aid eligibility. Individuals lacking a detailed understanding of financial aid satisfactory academic progress requirements, and state and federal aggregate program limits, have no business serving as academic advisors.

Require Academic Advisors to Understand Satisfactory Academic Progress Regulations for Federal and State Financial Aid

It is not too late to change your institutional training requirements for faculty and staff serving as advisors. The important knowledge regarding progress and financial aid programs can be learned. As such, it should be a requirement for the job.

Liberal Transfer Credit Policies

Colleges and universities can mitigate the odds for students running up against aggregate financial aid program limits by instituting transfer policies allowing for a more liberal acceptance of transfer credits. Colleges and universities often make students retake courses they have completed elsewhere. Take the time to reconsider your internal policies on transfer credits and err on the side of acceptance.

Low Residency Requirements

It is not unusual for colleges and universities to require 60 or more credits be completed at their institutions in order to graduate. This is excessive and guarantees that many students will need to spend additional terms enrolled. Dropping the residency requirement to 24 or 30 credits would go a long way toward reducing the number of transfer students who reach aggregate limits for financial aid programs.

Prepare to Invest More Financial Aid Dollars

You may wish to set aside additional funds, or create a new grant program, to address need gaps for students who have reached aggregate limits. It is a shame to have academically successful students forced to drop out one or two semesters before completion due to lifetime financial aid limits. While this new fund will require additional resources, it is worth the investment if it improves retention and graduations rates.

ENROLLMENT INNOVATION DURING COVID-19

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For the past few years, we've used this column to update you on critical issues impacting the state of higher education, and there is no bigger issue for all sectors of higher ed than the area of enrollment.

The most recent data from the *National Student Clearing House*, which analyzes data from 3.6 million students from 629 colleges, indicates that undergraduate college enrollment is down 2.5%. Community college enrollment decreased by 7.5%. Private four year institutions dropped 3.8 percent for non-profits and 1.9 percent for for-profits, while public four-year schools saw .4 percent change.

From the broader viewpoint, the most worrying statistic is that of community colleges who historically have thrived in enrollment counts during tough economic times. The fact that Americans didn't turn to higher education during this very tough year raises more questions than it reveals. Most notably, what has happened to the state of higher education and where do we go from here?

As we look to 2021, we asked presidents of 10 higher education institutions - four private, three public, two community college, and one for-profit - for their thoughts leading into the new year.

ENROLLMENT INNOVATION DURING COVID-19 CONTINUED:

We summarized our discussions with these presidents and note the two biggest concerns consistent across all institutional leaders, perhaps unsurprisingly, are budget and enrollment.

- **Budget** – All expressed concern over budget pressures. The presidents agreed that challenges from a shrinking college age population created tension before the pandemic. “The pandemic,” one stated, “made it at least 500 percent worse.” Another added, “Privates now have to worry about fewer unrestricted contributions and auxiliary revenues, publics have fewer state dollars available, and community colleges are lacking students able to pay and offset lower revenues from local and state sources.”
- **Competition in a shrinking pool** – “I no longer feel like we have friends in higher education because everyone is ‘fighting’ for every possible student – and dollar,” said an experienced private college leader.
- **The Biden Agenda** – All expect the election will pave the way for a dramatic shift in higher education policies. “Higher education will be a priority again with community colleges and Historically Black Colleges to be the biggest beneficiaries,” one said. The new First Lady is a lifetime community college instructor, and an HBC is one of four colleges in Biden’s home state. Biden has frequently pledged to make community colleges free and to address overall affordability for veterans, single parents, low-income students and students of color. He is expected to undo the Trump Administration’s modification of policy on Title IX of the Education Amendments of 1972. A for-profit president said, “Expect tougher scrutiny of for-profit colleges and the return of Obama administration regulations that were wiped away.”

All are hopeful that the President-elect’s pledge to double the maximum amount of Pell Grants will happen but agree that this and Biden’s hope for debt forgiveness for those with family incomes under \$125,000 could be a tough to sell to Congress in its current state.

- **Testing** – Interestingly, this topic was raised by three leaders but from different perspectives. For two private colleges, “test optional” has led to an early surge in inquiries and applications. For a regional state university and community college,

testing out of classes and experiential learning testing took on new meaning.

- **Toxic climate** – All raised concern about issues of race and the toxic political environment caused by the presidential election. “Once outspoken leaders on these topics, most college presidents now hunker down and go silent because of the risk of controversy,” said a 10-year president. “One misstep on these topics can lead to controversial publicity that can negatively impact enrollment and donors.”
- **Technology** – “During the first eight weeks of ‘stay at home,’ students were remarking that they may never go back in person,” said a 30-year president. “However, the longer hybrid, remote and online were in place, the more we heard from students missing the in-person experience. They badly wanted class dialogue, out of classroom work groups, and the overall residential experience. We consistently heard that a wonderful in-person professor doesn’t translate to that kind of quality in a different format.”

Technology was also discussed in terms of student recruitment. Because of restrictions on crowd sizes, most institutions are now using virtual open houses, short videos, personalized web distributions, texting and calling. “It’s like trying to sell a house online,” one president said. “You make it look the best you can, but it’s hard for students to know if it will truly feel like home.”

Many institutions are offering private tours to combat this, but pandemic-related travel restrictions in some states are continuing to pose a problem for colleges looking to show off their campus as part of their recruitment strategy.

This pandemic has affected every aspect of the student experience over the last year – from the first inquiry to Commencement ceremonies offered virtually. In the classroom and in recruitment, we have to change our mindset about what it means to truly connect with students and inspire them to choose higher education as a viable pathway to face and embrace the future, no matter the delivery.

Good News

The U.S. Department of Education has announced plans to reduce the number of financial aid applicants selected for verification. Approximately 30% of aid applicants were selected for this cumbersome process in the past. This percentage will be reduced to 18% making the application process for aid easier for families and reducing the workload for financial aid offices.

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THE DYSART GROUP is a higher education consulting firm specializing in enrollment management. We have provided enrollment management services to nearly 200 colleges and universities throughout the United States with extraordinary results.

Admissions

We have worked collaboratively with colleges and universities to significantly grow enrollment. Our institution-specific recommendations have helped colleges and universities increase the number of admission applications as much as three-fold. Improved communication strategies and new tracking metrics have resulted in higher folder completion rates and increased the number of students accepted for admission.

Financial Aid/Pricing/Net Revenue

Client institutions have been able to transform policies and practices to significantly improve financial aid operational efficiency, design better targeted institutional scholarship and grant programs, stabilize or reduce discount rates and utilize scarce institutional aid resources to specifically support recruitment and retention objectives.

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