Indiana University Kokomo engaged AACRAO Consulting Director Bob Bontrager to conduct a Strategic Enrollment Management analysis. Three campus visits have been conducted, with one additional visits planned. This report includes observations and recommendations from the three consulting visits, providing an update to the prior report submitted in June after the second campus visit.
Visit 1 Outline

May 15-16, 2007

Meetings with

- SEM Project Team: Marcia Gillette, Stuart Green, Paul Nowak, Jolane Rohr, Sue Sciame-Giesecke, Gerry Stroman, Jack Tharp
- Chancellor’s Cabinet
- Deans’ Council
- Admissions
- Information Management staff
- IT/Web staff
- Marketing and Communications
- Student Life
- Open Forum, with approximately 30 IU Kokomo faculty and staff in attendance
Visit 2 Outline

- June 19-20, 2007
  - Meetings with
    - SEM Project Team
    - Chancellor’s Cabinet
    - Deans’ Council
    - Academic Advisors
    - Admissions
    - Financial Aid
    - Information Management staff
    - Marketing and Communications
    - Registrar staff
Visit 3 Outline

- September 10-11, 2007
  - Meetings with
    - SEM Project Team
    - Chancellor’s Cabinet
    - Deans’ Council
    - Academic Advisors
    - Admissions
    - Financial Aid
    - Information Management staff
    - Marketing and Communications
    - Registrar staff
Setting Enrollment Goals

Observations

- Effective strategic enrollment planning and programs depend on clarity regarding the University’s comprehensive enrollment goals.
- IU Kokomo has defined aggregate headcount enrollment goals of 2,590 undergraduates and 3,010 total by 2011. More specific goals for different types of students (e.g., graduate, adult learners, degree completion/accelerated programs, specific programs/majors) do not exist.
- Setting comprehensive enrollment goals is an important mission-based conversation requiring engagement of all University faculty and staff.
Setting Enrollment Goals

- **Recommendations**
  - In Fall 2007, engage the campus in a dialogue on the desired future for IU Kokomo, designed to gain clarity and a reasonable level of consensus regarding University’s long term enrollment goals.
  - Focus the “future of IU Kokomo” dialogue on the question: “Based on our mission, what is the University’s ideal profile, in terms of the numbers and types of students we enroll?”
  - Have the dialogue co-facilitated by Sue Sciame-Giesecke and Bob Bontrager, to provide internal and external perspectives, as well as expertise in academic and strategic enrollment management.
Setting Enrollment Goals

Recommendations, continued

- Implement a process that will elicit campus-wide engagement and feedback regarding enrollment goals.
  - Campus Dialogue 1: September
    - Hold a series of forums to gain campus perspectives on the University’s desired student profile
    - Frame the conversations with enrollment-related information gathered in recent years from NSSE, Carnegie Communications, demographic data, and IU Kokomo enrollment reports.
      - Completed, September 10-11, 2007
  - Enrollment Project Team processes campus input and develops first draft of Enrollment Goals: October
  - Campus Dialogue 2: November
    - Hold a series of campus forums to discuss Enrollment Goals – Draft 1
    - Process feedback and revise goals as appropriate
    - Forward revised Enrollment Goals to Administrative Council for approval
Setting Enrollment Goals

Recommendations, *continued*

- Goal setting process, *continued*.
  - Administrative Council approves goals or specifies additional processing steps: December
  - Implementation: January and following
    - University recruitment and retention programs and related budget allocations are aligned to enrollment goals.
    - Enrollment goals area written into the University’s Strategic Plan as revisions are made.
Setting Enrollment Goals

Feedback from Campus Dialogue 1

- A total of 56 persons participated in 6 forums to discuss enrollment goals for IU Kokomo. Participants included 21 faculty members.
- While opinions varied widely, forum participants collectively expressed a desire for:
  - Undergraduates who are *better prepared* academically
  - Undergraduates who are *motivated* to be successful academically
  - More graduate students, with suggested percentages ranging from 5-15%
  - Increased transfer students
  - Larger undergraduate enrollment, to achieve the critical mass required to offer a high quality educational experience, with a full range and depth of programs
Retention

Observations

- Retention is the single most important component of a strategic enrollment management plan.
  - Retention activities generally are less expensive than recruitment activities.
  - Retention rates reflect the quality of the education experience provided by an institution. When that quality is high, it is easier not only to retain students, but to recruit additional new students as well.

- Research on the effectiveness of specific retention activities is limited. This leads many institutions, including IU Kokomo, to implement a series of ad hoc projects with limited analysis of measurable outcomes. There is need for a retention plan that specifies activities and measurable outcomes for a 3-5 year period.

- It is difficult to provide adequate oversight of the operational aspects of retention from a cabinet-level position, as is currently the case at IU Kokomo.
Retention

Recommendation

- Appoint a Retention Coordinator to provide operational oversight to retention planning and programs
  - Reporting to the Vice Chancellor for Academic Affairs
  - Regular reporting schedule to the Administrative Council
- Develop a 5-year retention plan with specified, coordinated activities and measurable outcomes.
Recruitment and Marketing

Observations

- While IU Kokomo’s recruitment and related marketing strategies are fundamentally sound, there are opportunities for improvement. Steps toward implementing these improvements have already been initiated under the capable leadership of Jolane Rohr in Admissions and Paul Nowak in Marketing & Communications.

- Effective planning for recruitment and related marketing occurs on an 18 month cycle. This allows for efficient planning of staff time, development of marketing materials, and more cost-effective budget allocations. This means that plans to enroll new students for 2008-09 should be made now (or a bit earlier). Admissions and Marketing & Communications have begun this planning process.
Recruitment and Marketing

- Observations, *continued*
  - In the past, Admissions and Marketing & Communications have collaborated on ad hoc projects throughout the year, but have not engaged in joint planning that would allow for more cost effective planning and coordination of efforts.
  - Prospective students and families benefit by being provided clear timelines that lead them through the process of selecting a college and starting the college experience. IU Kokomo sets fewer deadlines than other institutions, leaving students without adequate “roadmaps” for becoming an IUK student. In addition to the confusion this creates, it gives the impression that IU Kokomo is of less value and prestige due to its more lax approach.
Recruitment and Marketing

Observations, continued

- In the past, students whose names are purchased through PSAT or SAT have been sent a postal mailing only. It will be beneficial to augment the postal mailing with two e-mail messages, which can be sent for no cost other than minimal staff time.
- E-mail messages sent to prospective students have consisted of text only.
Recruitment and Marketing

Recommendations

● Advance planning
  — Admissions and Marketing & Communications should engage in joint planning each Spring to map out all recruitment and related marketing activities to occur in the coming year. As noted above, these units have begun this process, having participated in a joint retreat in June 2007 to beginning planning for the 2007-08 recruiting cycle.

● For students whose names have been purchased, send an e-mail message before and after the postal mailing.

● Create a template with strong graphic design for sending e-mail messages to prospective students.
Recruitment and Marketing

Recommendations, *continued*

- Create enrollment “roadmaps”
  - Create an “Intent to Enroll” process in which students are asked to clearly indicate their intent to enroll at IU Kokomo by May 1 for the subsequent Fall Semester. To provide an incentive, require that students indicate their intent in order to be eligible to register for summer advising/registration programs.
  - For high ability students, create an “Early Scholars Program”. Inviting them to apply by November 1 in order to receive an admission decision and potential early scholarship award by December 1.
University Web Site

Observations

- In addition to campus-wide needs and benefits, web functionality represents the leading edge of current, most effective recruitment and retention activities.
- IU Kokomo’s website is outdated and lacks sufficient functionality. This reality has led to the process currently underway to develop a new University web site.
- The best university web sites combine strong design with leading edge functionality, that is, the ability for students and other stakeholders to complete transactions 24/7 in real time.
- The University’s is to be commended for its thoughtful approach to web site development, having engaged a firm to assist in creating an RFP for web development.
Universities, as well as many marketing service providers, make three common mistakes in developing web sites:

- Focusing on design at the expense of functionality.
- Expending excess funds for design enhancements and multilayered sites that are overly complex, take an extraordinary amount of time to develop, are difficult to revise, and do not deliver value that is commensurate with development costs.
- Failing to adequately plan for ongoing maintenance of the site, in terms of providing fresh, timely content.
University Web Site

Observations, continued

- Effective web site development and ongoing management requires active, close collaboration among marketing and IT staff, with input from functional areas for their portions of the site (for example, admissions, academic units, development, student affairs).
  - The ideal is to have a campus webmaster, generally in the marketing department. However, the key issue is collaboration among marketing, IT, and functional areas – not the organizational structure and reporting lines.
  - While all functional areas of the University are important and will be engaged in site development over time, the biggest near-term gains for enrollment will be related to Admissions, and that should be the initial focus.
  - If it is not possible to fund a new web master position, an alternative would be to create a Web Team, with joint leadership provided by a member of the OCM and IT staff, along with, initially, a staff member from Admissions.
  - As their portions of the site are developed, functional areas will need to appoint a staff member to work with the web team.
University Web Site

Recommendations

- In selecting a vendor for web development, focus on:
  - Functionality: providing students with the capability to complete meaningful transactions with the University that lead them through the college search, selection, admission process, thereby increasing the likelihood of their enrolling at IU Kokomo (with similar functionality to be developed for other University stakeholders).
  - Time required to develop an effective site.
  - Ease of maintaining content, through use of a content management system.
  - The ability to maximize search results, ensuring that online searches with certain key words result in IU Kokomo being listed at or near the top of search results.
    - Key words would include campus-wide and program-specific characteristics.
University Web Site

Recommendations, continued

- Determine if funding is available for a Webmaster position. If not, appoint a Web Team with representatives from OCM, IT and Admissions. These persons will lead initial development, and engage representatives from other functional areas over time.
Financial Aid

Observations

- Award letters have been sent to prospective students as late as June-July, which is too late to influence enrollment decisions for most students.
- The University Grant for needy students has been $200, an amount that is too small to influence enrollment decisions.
- In order to implement the “Early Scholars Program” described above, some IU Kokomo scholarships will need to be awarded earlier.
- The STAR scholarship program will need to be revamped in order to ensure adequate funds are available to implement the recommendations contained in this report.
Financial Aid

- Recommendations
  - To have the maximum benefit in influencing enrollment decisions, award letters to prospective students should be sent by March 15. The Financial Aid staff has already taken steps to make this happen.
  - For University Grants, narrow the eligibility criteria to decrease the number of eligible students, and increase the grant amount to $500.
  - Expand the criteria for the Phoenix Scholarship program to allow for 20-25 $2,000 awards to students selected for the “Early Scholars Program”.
  - Revise STAR scholarship criteria to free up funds needed for the “Early Scholars Program”.

AACRAO Consulting
Providing Best Practice Solutions for Higher Education