INDIANA UNIVERSITY KOKOMO

STUDENT RECRUITMENT MARKETING PLAN

APRIL 2002–AUGUST 2005

Completed by:

IU Kokomo: Office of Admissions
                Office of Communications and Marketing
                Office of External Relations
IU: Office of Communications and Marketing, division of Public Affairs and
                Government Relations

EXECUTIVE SUMMARY

This plan represents a response to the Chancellor's challenge to return campus enrollment to 3,000. It presents a careful assessment of where the campus currently stands in the marketplace and realistic goals for increasing enrollments and enhancing institutional image. The plan also details clear, concise messages that will be communicated to target audiences and the coordinated strategies and tactics that will deliver these messages.

The plan is a working document, designed to engage the entire campus and guide all communications in a coordinated and strategic fashion. A variety of opportunities for campus-wide involvement is offered. Readers will note that there are a fair number of broad strategies and tactics that could easily be expanded and acted upon by faculty and staff. This plan is designed to ensure that the entire campus acts in a coordinated fashion and speaks with one voice. Whether the campus will reach the goals outlined herein is dependent upon a synergy between the Office of Admissions and the Office of Communications and Marketing, and the degree to which the broader campus engages in the spirit and execution of the plan.

The plan begins with a careful description of its purpose and the current state of affairs. It is important to note that substantial time and resources were invested in learning where the campus currently stands vis-à-vis the market of prospective students and marketing efforts. A more comprehensive understanding of current and prospective students' perceptions was attained through various research efforts including three Carnegie Communications studies and several focus groups conducted by the Indiana University Office of Communications and Marketing. The results of said research guided the marketing messages that the plan hopes to deliver and the key audiences that will be targeted.

The nucleus of the plan enumerates the strategies and tactics that will be executed. They represent a combination of research recommendations and best practices in marketing higher education. Readers will find a heavy emphasis on improving the quality and variety of IU Kokomo publications, increasing investments in technology (the Web site and PeopleSoft® in particular), and a major focus on developing a coordinated and strategic approach to a variety of communications activities including a particular emphasis on advertising.

INTRODUCTION

In her *State of the Campus* address in January 2000, Chancellor Ruth Person challenged IU Kokomo staff and faculty to come together and work more strategically to return campus enrollment to at least 3,000 by the fall of 2005. It was determined that one of the most critical aspects of the effort would be a plan to better tell IU Kokomo's story. To that end, the campus engaged in an examination of existing marketing resources, institutional efforts, and IU Kokomo's relative standing in the marketplace.

The diverse methods and departments involved in telling IU Kokomo's story are many and varied. The means include publications, advertising, media relations, Web pages, e-mail and personal visits and letters from faculty and staff. These activities require coordination among Admissions, Communications and Marketing, External Relations, academic departments, and key faculty and staff.

If IU Kokomo is to make optimal use of limited marketing resources, it is critical that the execution of marketing tactics and related departmental activities be coordinated in a cogent and strategic fashion. The campus must repeatedly articulate, in one voice, simple, clear, and consistent messages. The purpose of this plan, and the success of the marketing effort in enhancing enrollment, is predicated on data-driven strategies and wise use of available resources.

RESEARCH

IU Kokomo has demonstrated success in using sound marketing research to guide decision-making. Previous marketing studies were, and continue to be, key in guiding campus decision-making and shaping campus priorities and action strategies. A study in 1986 pointed to the need for placing more emphasis on high school recruitment. In 1995, the Indiana Public Opinion Poll (Vargus Reports) helped in defining specific promotional messages for adults and teenagers and the media outlets most used by local consumers. A 1996 study, aimed at adults, led to the development of the ACCEL program.

As IU Kokomo began to lay the foundation for this current marketing plan, more up-to-date marketing research was required in order to understand the changes in the composition of the student body. In late spring and early summer of 2001, Carnegie Communications of Westford, Massachusetts, conducted an extensive study with *prospective students*, focusing on recruitment and marketing issues, and with *current students*, focusing on retention issues.

At nearly the same time, Carnegie Communications conducted a university-wide study on the college choice processes of non-traditional students. This study was sponsored by the IU Office of Communications and Marketing, a division of Public Affairs and Government Relations. IU Kokomo also conducted an image-and-perception study and two years of the National Survey of Student Engagement (NSSE).

The Carnegie projects, as well as the focus group testing, drove the crafting of the marketing messages and have been pivotal in formulating key strategies and tactics in this plan. While

findings from these studies are too extensive to review in this document, elaboration on how the research drove certain aspects of the plan is provided in more detail or otherwise identified throughout this plan, as appropriate.

In addition to the primary research, considerable institutional research has been conducted by the IU Kokomo Office of Student Services resulting in trend data on applicants, admitted students, matriculants, and numerous other variables. The enrollment projections of this plan, as detailed in Appendix A, reflect historical trends, local market factors, and institutional knowledge.

LOOKING AHEAD

There are a number of environmental factors that impact IU Kokomo's enrollments. Some of these factors can be controlled or influenced. Others must keep in mind as the plan is crafted to mitigate their effects at the very least. Below is a brief environmental scan.

Public Policy
State funding for higher education is becoming increasingly unstable and unreliable, and continues on a downward trend. The IU Kokomo campus must be postured to address ever-increasing cuts in funding in the coming years. The need for healthy enrollments and a strong position in the marketplace has never been more critical.

Economy
The economy in north central Indiana is disproportionately tied to the manufacturing industry and to automobile production in particular. This creates a multi-faceted challenge for the campus. In the short term, while the economy is weak, the campus must be poised to communicate that now is the time to return to school and start a new career. In the long term, as companies continue to move operations out of Indiana, IU Kokomo must play a key role in realigning the region's workforce with a knowledge-based economy. In strong economic times, the campus must be ready to help the region understand the value of higher education.

Demographics
IU Kokomo continues to serve the needs of a diverse student population. In the near term, both traditional and non-traditional students will be critical to healthy enrollments. However, these students require specialized and tailored marketing messages and strategies. Developing messages that resonate with one group, but do not alienate another is a challenge. In addition, IU Kokomo's 11-county service region provides its own set of challenges. The socio-economic profiles of these 11 counties vary widely. IU Kokomo's messages must hold universal appeal across the region.

Marketplace and Perceptions
The Carnegie research identified perception issues for IU Kokomo vis-à-vis its competitors that must be addressed. Traditional-aged prospects tend to view IU Kokomo as a "a lot like high school." Though some view this perception in a positive, supportive light, it causes others to question the quality of education that IU Kokomo provides. Non-traditional prospects present another challenge. They are often unable to differentiate the educational benefits of IU Kokomo from those of competitors such as Indiana Wesleyan and Ivy Tech State College.

Communicating IU Kokomo's competitive advantage ("Why should I choose IU Kokomo?") to prospective students and influencers alike has never been more crucial or more challenging.

New Programs
Marketing dollars for promoting the IU Kokomo campus are limited. Correspondingly, the additional marketing efforts that must accompany the implementation of new degree programs and new majors must be incorporated into a finite budget. It is critical that the impact of campus-wide promotional initiatives not be watered down by multiple programmatic themes. In most cases, program-specific needs will be "highlighted" in campus-level advertising as appropriate.

GOALS

The central goal of the Indiana University Kokomo marketing plan is to **ensure and enhance the fiscal stability of the campus** so as to meet the educational needs of north central Indiana residents. To this end, the campus has focused on three critical tasks (in priority order):

1) Increase and sustain enrollment of traditional and non-traditional students[1] (Appendix A);

2) Increase awareness and enhance images and perceptions of Indiana University Kokomo among target audiences; and

3) Broaden and deepen external support for Indiana University Kokomo among donors, alumni, elected officials, the north central Indiana service region, and other centers of influence in order to strengthen campus resources and reputation.

The Indiana University Kokomo Student Recruitment Marketing Plan outlined herein focuses only on goals #1 and #2 above.

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[1] The enrollment goals (3,000 students by 2005) outlined in Appendix A are predicated on increases in the growth of both new students as well as improvement in student retention. The Student Recruitment Marketing Plan addresses only the new student portion of the goals. The marketing plan projects this goal will be reached in fall 2005 through annual increments of 70 additional undergraduates: 30 new and 40 continuing. From fall 2003 to fall 2005, the cumulative total of 30 new full-time students each year, less attrition, would account for an additional $517,716 in tuition revenue. The new students would also produce an additional $134,400 in enrollment change funding during this period. IU Kokomo has experienced a 2 percent growth over the past two years. The projections assume an increase to 3 percent growth over the next three years. See Appendix A for more detail.

AUDIENCES

The primary target audiences of these marketing efforts are the following:

1) Prospective students and their influencers
   a. Traditional
   b. Non-traditional.
2) Alumni (Indiana University Kokomo graduates and all Indiana University graduates residing and/or working within the 11-county service region)
3) Business leaders and employers
4) Donors and prospective donors to Indiana University Kokomo
5) The north central Indiana community
6) Indiana University Kokomo internal audiences

MARKETING MESSAGES

Overview
Marketing messages are one of the most critical elements of a marketing plan. They are the consistent statements throughout the marketing activities that are design to deliver to target audiences in an effort to affect their attitudes, beliefs and behaviors. As a result, they are crafted with substantial thought, analysis, and research. This process results in effective messages that have three characteristics.

- **Differentiation:** communicate how IU Kokomo is different from competitors.
- **Relevance:** communicate differentiation along dimensions that are relevant to the target audience and offer a competitive advantage.
- **Credibility:** communicate messages that are believable to the target audience.
- **Clarify:** communicate messages that are clear, concise and few in number.

It is also important that messages be few in number as well as clear and concise.

The IU Kokomo marketing messages have been developed in this spirit, drawing largely from two phases of research: 1) the *IU Kokomo Inquirer and Retention* and 2) *University-wide Non-traditional Prospects* studies conducted by Carnegie Communications. Each study was used to develop a set of "possible" messages that were likely to be effective. The key findings from the research were:

Inquirers:
1. Top three motivators for attending college in general are:
   • completing a degree
   • getting a job with strong career potential
   • taking courses related to a specific occupation.
2. Many inquirer groups are attracted to a campus where "teachers know my name."
3. Key strengths of IU Kokomo were identified as location close to home, affordable tuition, small classes/campus and connection to IU.

Retention:

1. Nearly three-quarters of students enroll at IU Kokomo because it is close to home.
2. Students generally agree that IU Kokomo is worth the cost of tuition, offers high-quality education and has high-quality professors.
3. Students were likely to agree that completing their degree at IU Kokomo would help them get a good job upon graduation.
4. Most students work full or part-time.

Non-traditional:

1. The choice factors that non-traditional students consider in choosing a college, in order of importance, are scheduling, reputation, the support provided by enrollment staff, cost, and location.
2. Non-traditional students face a host of barriers when considering going or returning to college. They are fitting school into an already busy life, securing resources to attend, making a difficult and unfamiliar decision, and overcoming a fear of failure.

Once possible messages were crafted, they were re-tested. In the second phase of research, they were tested against the three criteria listed above [scheduling, reputation, and support] among prospective and current students as well as institutional influencers. The messages presented below represent those that meet all five criteria and reflect the words and phrases of the target audiences.

Please note Figure 1 for an overview of IU Kokomo's key competitors and the key points of differentiation from each of them.

Figure 1. IU Kokomo's Differentiation from Key Competitors

Competitor	IU Kokomo's Distinguishing Messages
BSU, IUB, IUPUI, PU	Same education close to home. Same education for half the cost.
Ivy Tech	Quality: Degrees with clout. Quality: Premier university education.
Indiana Wesleyan	Quality: Degrees with clout. Affordable: Accelerate your degree but not your debt. Support: Full-service support services.
Not going to college	A degree is important; we can help you get it.

Messages

Please note that ~~stricken text~~ (line through) indicates messages that were tested but did not resonate or ring true with participants. Messages are either flagged as "Media Ready," indicating they can be presented in ads and literature exactly as they are or flagged as otherwise. Those that are not "media ready" are messages where the *idea* resonates but are best conveyed in examples rather than specifically articulated. Finally, the messages have been prioritized for each audience.

Traditional Prospects

At IU Kokomo . . .

1 <mark>**get an IU degree close to home**</mark>**. [Media Ready]**
~~we are Indiana University close to home~~
  - ~~You get an IU degree without housing and travel costs~~
  - IU quality: Professional programs meet the highest accreditation standards.
    - Business (AACSB International), nursing (CCNE & NLN), education (NCATE) *[Caution: prospects do not understand accreditation]*
  - IU quality: It's a degree well known nation-wide.
  - IU quality: We have the resources of a large university.
    - Technology, Hunt Hall (science building), Library (entire IU system)
  - You can work and go to school at the same time.
    - 20 percent of students work full-time, and half work part-time.
  - You can stay close to family and friends
  - Showcase strengths and qualities of academic departments.
  - IU connection: Many of the resources of Indiana University are available to students on the Kokomo campus, such as Study Abroad.

2 <mark>**get a quality education at an affordable cost**</mark>**. [Media Ready]**
~~you get a premier university education at half the cost.~~
  - Tuition, fees, and books are less than $4,700 a year for full-time students.
  - 40 percent of students receive financial aid. *[Caution: Some see this as a low percentage.]*
  - All at Indiana University quality.

3 <mark>**faculty know your name**</mark>**.** ~~AND have Phd.~~**[Media Ready]**
  - Faculty –student ratio is 1:16.
  - Undergrads have research and faculty collaboration experiences that are rare at large campuses.
  - Smaller classes contribute to student success.

Non-traditional Prospects

At IU Kokomo . . .

1 ==**get a quality education at an affordable cost**==. **[Media Ready]**
~~you get a premier university education at half the cost.~~
   o Students can pay by the course at $348 per course.
   o Tuition, fees, and books are less than $4,700 a year for full-time students.
   o 40 percent of IU Kokomo students receive financial aid. *[Caution: Some see this as a low percentage.]*
   o You can accelerate your degree without accelerating your debt!
   o All at Indiana University quality.

2 ==**you can find a schedule that works for you**==. **[Media Ready]**
   o Half of IU Kokomo classes are offered in the evenings.
   o Several degrees can be completed with only evening classes.
   o Our accelerated General Studies degree offers 8-week courses.
   o ~~Highlight the new waitlist feature of registration.~~
   o IU Kokomo offers independent course study options.
   o ACCEL program allows students a shorter time to degree completion.

3 ==**offers services that meet the needs of busy adult students**==. **[Media Ready]**
~~Understands and meets the needs of busy adult students~~
   o High-quality, licensed childcare service.
   o Free tutoring at the Learning Enhancement Center.
   o Quality advising that keeps you on track.
   o Career development and placement services.
   o Advisors readily available to assist decision-making.

4 ==**faculty know your name**==. ~~AND have a Phd.~~**[Media Ready]**
   o Faculty–student ratio is 1:16.
   o Undergraduate students have research and faculty collaboration experiences that are rare at large campuses.
   o Smaller classes contribute to student success.

5 ==**45 percent of students are over 24** ~~or older~~.==
   o These students tend to perform as well academically as younger counterparts … and sometimes better.

6 ==**Online ACCELerated Evening College is convenient**==

All Prospects (Secondary Messages)

At IU Kokomo . . .

- **==get an IU degree close to home==. [Media Ready]**
  ~~we are Indiana University close to home~~
  - o You get an IU degree at a reduced cost.
  - o IU quality: Professional programs meet the highest accreditation standards.
    - ▪ Business (AACSB International), nursing (CCNE & NLN), education (NCATE) *[Caution: prospects do not understand accreditation]*
  - o IU quality: Degree is well known nation-wide.
  - o IU quality: We have the resources of a large university.
    - ▪ Technology, Science Laboratories, Library
  - o You can work and go to school at the same time.
    - ▪ 20 percent of students work full-time, and half work part-time.
  - o You can stay close to family and friends.
  - o Showcase strengths and qualities of academic departments.

- **==your degree has clout/is well respected==. [Idea demonstrated through testimonials only]**
  - o Alumni are successful.
  - o Area employers want to hire IU Kokomo graduates.
  - o Area employers are IU Kokomo graduates.
  - o Local internships help in securing a job upon graduation.
  - o IU Kokomo offers placement services for graduates.
  - o *Note: prospects seek out numbers and facts that demonstrate this message*
  - ~~o IU Kokomo offers degrees that are in demand in the job market~~
  - ~~o One in five area college-bound high school students attends IU Kokomo~~

- **==IU Kokomo offers services that help you succeed==. [Media Ready]**
  ~~A degree is important, and we help you get it.~~
  - ~~o On average, those with Bachelor's degrees earn $17,000 more annually than those with a high school diploma.~~
  - ~~o 400 degrees are awarded each year at IU Kokomo.~~
  - o Regular academic advising. (not tested)
  - o Learning Enhancement Center, if required. (not tested)
  - o Readily available support staff, such as faculty advisors. (not tested)
  - o Online resources. (not tested)

- **==Three in four faculty have a doctorate==. [Media Ready]**

- **==IU Kokomo offers over 30 degree programs==. [Media Ready]**

<u>Community, Alumni, Donors</u>

At IU Kokomo . . .

- **IU Kokomo is improving the *Quality of Life* for people in the region.**

- **IU Kokomo provides *outstanding academic programs.***
  - ○ <u>Highlight nursing, education, and business</u>
  - ○ <u>Include "nationally accredited" verbage</u>

- ~~**IU Kokomo is *the* region's Public University**~~

- ~~**IU Kokomo is a driving force in shaping the region's *economic future*.**~~

STRATEGIES AND TACTICS

This section is divided into three major categories of emphasis. The first category is *recruitment efforts*, designed specifically to persuade more prospective students to consider IU Kokomo and enroll here. Secondly, *campus-wide* activities include recruiting activities at a campus level, but also include activities that meet other goals as well. The third and final section, *evaluation and execution*, deals with the particulars of implementing the plan.

COLLABORATIVE RECRUITMENT EFFORTS BETWEEN ADMISSIONS, MARKETING & COMMUNICATIONS, ALUMNI RELATIONS, AND ACADEMIC DEPARTMENTS

Meeting the campus enrollment goal of 3,000 students by fall of 2005 will require that undergraduate headcount represent 82–83 percent of total enrollment. Each fall, new beginners and transfers currently comprise 30 percent of the undergraduate population. This 30:70 radio must remain constant to meet total undergraduate enrollment goals. Students directly enrolling from high school should approximate 60 percent of new degree-seeking students each fall (Appendix C).

Gains in undergraduates will be dependent upon increasing student recruitment productivity in key local high schools, increasing the number of older adults and one-year transfers, and improving yield rates in the latter two categories.

STRATEGY 1   **Develop New Recruitment Literature.** A comprehensive review of the campus recruitment materials revealed that most of the publications have limited resonance with target audiences and are visually or factually out of date. In some instances, where specific printed information is needed it is simply absent. The publications outlined below are fundamental pieces for any modern-day Admissions Office. Contact pieces are essential for generating prospects, viewbooks for generating applicants and targeted, timed mailings for sustaining interest and yielding matriculants.

1.1 Rewrite and redesign **viewbook and contact piece** using literature-testing methodologies and partnering with the Indiana University Office of Communications and Marketing. This is to be done every two years.
    Priority: Very High   **Responsibility**: Tharp, Damler, Salerno
Timeline: Traditional: September 2002; August 2004
                 Non-traditional: September 2002; August 2004
Status: Complete

1.2 Produce an annual **financial aid piece.**
Priority: High   **Responsibility**: Kennedy-Fletcher, Damler
Timeline: ~~January 15, 2003~~   August 2003
Status: Complete August 2003, August 2004

1.3 Include a **direct mail postcard** in mail sequence for PSAT search.
Priority: High   **Responsibility**: ~~Young~~, Damler,
Timeline: On-going   Kennedy-Fletcher
Status: Complete
              May want to develop new postcard

1.4 Rewrite and redesign **degree program fliers** to 8-panel brochures
     (8 1/2 x 14) to allow for multiple and wider uses.
Priority: High   **Responsibility**: Green, Damler
Timeline: November 15, 2002
Status: Complete December 2002; removed from recruitment materials mix fall 2004

1.5 Develop a **series of 3 post-cards** for non-traditional students to retain their interest and reinforce marketing messages over time. 10,000 printed copies of each card (*Carnegie non-traditional study shows these students take three years to make a decision about returning to college so a long-term marketing effort is required.*)
Priority: Moderate   **Responsibility**: Kennedy-Fletcher, Damler, Hakes
Timeline: ~~Card 1 & 2   November 15, 2002~~
              ~~Card 3 & 4   February 15, 2003~~
              ~~Card 5 & 6   April 15, 2003~~
Status: Complete September 2004

1.6 Develop a **series of 3 post-cards** for traditional students targeted to both the student and the parents. 10,000 printed copies of each card. (Carnegie IU Kokomo study showed that while parents will not open a child's mail, they will read postcards).
Priority: Moderate   **Responsibility**: Kennedy-Fletcher, Damler
Timeline: ~~1 & 2   November 2002~~
             ~~3   February 2003~~
Status: Complete September 2004

1.7 Redesign the **VIP Day invitation** to make it more appealing.
Priority: High   **Responsibility**: Kennedy-Fletcher, Damler
Timeline: September 30, 2002
Status: Complete September 2002
              Second redesign complete August 2003
              Third redesign complete August 2004

1.8 Develop a **"Why IU Kokomo" piece** for parents and adult students that focuses on how to choose the right school and assist with making informed choices (Carnegie – IU Kokomo). AKA "Choosing the Right College"
Priority: Moderately High   **Responsibility**: Tharp, Damler
Timeline: March 2003
Status: Complete December 2002

1.9 Develop an **IU Kokomo Campus Brochure** for visitors to campus with campus map, building photos, information from FACTS brochure, etc.
Priority: Moderate   **Responsibility**: Yost, Tharp, Damler
Timeline: October 2003
Status: Complete February 2004

1.10   Reduce the number of printed copies of **IU Kokomo Bulletin** from 12,500 copies to approximately 500. Have Bulletin available online in both PDF and text-only formats to realize cost savings in both paper and printing services. Bi-annual project.
Priority: High   **Responsibility**: Damler, T. Sehr, Rivers
Timeline: September 2, 2002
Status: Complete September 2002; September 2004

STRATEGY 2   <u>Improve and Better Utilize Technology.</u> The Internet and campus homepage have become the most influential recruiting tools for all colleges. The campus homepage is where students go first for information. It is crucial that the Web site is useable, attractive, and representative of the campus' best features. In addition, users expect ***up-to-date, dynamic, and accurate content.***

2.1 <u>**Redesign campus and Admissions Web pages**</u>
  Priority: Very High   **Responsibility**: Damler, Salerno
  Timeline: Done
  Status: Complete April 2002. On-going updates.
         Complete redesign to launch mid-June 2005

2.2 Develop a plan and align personnel resources to **<u>ensure continuous maintenance and enhancements for the Web site</u>** to ensure it delivers fresh and dynamic content each day. Authority and oversight to approve or disapprove any content/design for the Web site must reside with the IU Kokomo Director for Communications and Marketing and the IU Kokomo Webmaster. Increasing the Webmaster's commitment from 10 to 20 hours per week is recommended. In addition, develop a long-term plan for funding a full-time Webmaster.
  Priority: High   **Responsibility**: Damler, Yost, ~~Rivers~~
  Timeline: December 2003
  Status: Approval for Webmaster (20 hr per week) to be shared with IT
         Complete December 2003

2.3 **<u>Leverage the new IU Kokomo Web site more fully</u>** by incorporating the new marketing messages into key areas of the site and prominently displaying the URL on all marketing materials.
  Priority: Very High   **Responsibility**: Damler, Salerno
  Timeline: Done
  Status: On-going

2.4 **<u>Enhance utilization of the prospect-management module of Peoplesoft</u>**® by collecting more information on prospects (specifically that information recommended by Carnegie Communications for IU Kokomo), developing a processing system to correlate with the written communication plan, providing the necessary resources to send information requests on a daily basis, and utilizing the system to gain valuable research to enhance and drive recruitment strategies.
  Priority: High   **Responsibility**: Kennedy-Fletcher
  Timeline: October 2002
  Status: On-going

2.5 **Increase usage of the "Apply Yourself" application** by promoting the new application to prospects, communicating to guidance counselors the preference for electronic applications, improving the flow of questions on the application, and using e-mail to encourage prospects with "in progress" applications to complete them on-line.
Priority: High   **Responsibility**: Kennedy-Fletcher
Timeline: October ~~2002~~ 2003
Status: On-going

Secure and activate URL www.iuk.edu/applyonline
Priority: High   **Responsibility**: Damler, Rivers
Timeline: August 2003
Status: Complete August 2003

STRATEGY 3 **Design a Systematic Communication Plan.** The college search process has often been described as a "courtship," where both the campus and the prospective student decide if they are a mutually good fit by getting to know each other in increasing depth over time. The modern Admissions Office takes a sophisticated and strategic approach to this process, ensuring that the information a student is considering or seeking is delivered at just the right time.

3.1 Establish **appropriate sequence of publications** and materials to send to targeted audiences from the Admissions Office, aligning communications with predefined mailings ranging from mass volume, such as PSAT and SAT searches, to single individual prospect cultivation and/or follow-up.
Priority: Very High   **Responsibility**: Kennedy-Fletcher
Timeline: September 2002
Status: Complete

3.2 Develop a plan for **additional follow-up that is both personal and primarily verbal**, involving current student volunteers, department faculty, and the Chancellor. The plan should outline a process by which prospective students are connected early in their search process with faculty in the department of their anticipated field of study (as recommended by Carnegie Communications from the IU Kokomo survey).
Priority: High   **Responsibility**: Green, Hightower,
Timeline: September 2002   Kennedy-Fletcher
Status: On-going

3.3 **Involve alumni in the communications sequence** by having them welcome new admits with congratulatory phone call to help in maintaining contact after the application process.
Priority: High   **Responsibility**: Hightower,
Timeline: March 2004   Kennedy-Fletcher,
Status: In process   Wittmeyer

STRATEGY 4   **Segment Target Audiences.** Apply appropriate strategies for four key audiences: 1) Students enrolled in high school; 2) Traditional-age students out of high school 1–2 years, including transfers; 3) Minority students; and 4) Non-traditional students, including individuals with previous college work.

4.1 **Continuously review feeder school trends and be more strategic** with high school visits and relationship cultivation with guidance counselors, spending proportionally more time in under-performing schools such as Carmel, Westfield, Frankfort, Logansport, and Marion. This includes continuing to "over-mail" to non-repliers, strategic use of current students in recruitment activities, and regular placement of advertising in selected high school newspapers. See Appendix C for more detail.
Priority: Very High   **Responsibility**: Kennedy-Fletcher, Tharp
Timeline: On-going
Status: On-going

4.2 **Expand the prospect pool** with the systematic collection of prospect information at all events and activities.
Priority: Very High   **Responsibility**: Kennedy-Fletcher,
Timeline: September 2002   Wittmeyer
Status: On-going

4.3 Change and **continuously improve on-campus visitations, orientations and interventions** for students who have fears about attending college. Incorporate the IU Kokomo video into the visitation.
Priority: High   **Responsibility**: Kennedy-Fletcher
Timeline: On-going
Status: On-going

4.4 Improve relationships with guidance counselors. **Develop a tri-annual newsletter** for guidance counselors, prospective students, and parents to improve communication.
Priority: Moderately High   **Responsibility**: Damler, Wittmeyer
Timeline: ~~January 2003~~   Kennedy-Fletcher,
Status: Re-evaluate

4.5 **Implement recommendations from the non-traditional marketing survey**, recognizing that prospect lists should be maintained for 3 years and that specific literature and media messages must be developed for adults.
Priority: Very High   **Responsibility**: Damler, Hakes
Timeline: On-going   Kennedy-Fletcher
Status: On-going

4.6 Implement a **workshop to assist adult students** entering Indiana
University Kokomo (Carnegie – non-traditional).
Priority: High   **Responsibility**: Tharp, Hakes, Collins
Timeline: ~~April 2003~~
Status: Complete

4.7 **Focus on scheduling as the primary marketing tool** for non-traditional
students. Increase use of ACCEL format, and track and respond quickly to
scheduling demands (Carnegie – non-traditional).
Priority: Very High   **Responsibility**: Tharp, Green, Hakes
Timeline: September 2002
Status: On-going

4.8 **Create linkages between IU Kokomo and Ivy Tech** to increase transfer
applicants.
Priority: High   **Responsibility**: ~~Young~~, Tharp, Green
Timeline: On-going
Status: On-going

4.9 **Implement university-wide objectives to improve recruitment efforts
with under-represented groups**. Support the Office of Campus Climate,
the 21st Century Scholars and Destination:Education to carry out the IU
Kokomo minority recruitment plan, for which funds have been budgeted
for several initiatives.
Priority: Very High   **Responsibility**: Barnes,
Timeline: September 2002   Kennedy-Fletcher
Status: On-going   21st Cent. Scholar/DE rep

STRATEGY 5 <u>**Involve Academic Departments**</u> in recruiting their own majors, through linkage to the communication plan, cooperative high school visits, and greater collaboration in campus visitations.

    5.1 <u>**Develop a ventures fund**</u> to provide seed money to encourage academic departments to develop strategic recruitment materials and activities that reinforce the marketing messages and the IU Kokomo identity.
        Priority: Moderately High **Responsibility**: Proudfoot, Damler, Green
        Timeline: July 2003
        Status: Not complete. Priority lowered.

    5.2 <u>**Provide seed money**</u> to academic departments ($3,000 per division) for implementation of the activities identified in their departmental Retention Action Plans.
        Priority: Moderately High **Responsibility**: Green
        Timeline: July 2003
        Status: Complete

    5.3 <u>**Develop**</u> specific plans within each school for <u>**school specific recruitment strategies**</u>.
        Priority: High   **Responsibility**: Green, Academic Council
        Timeline: July 2003
        Status: Complete

    5.4 <u>**Connect IU Kokomo faculty with area high school teachers**</u> through classroom presentations and similar organizational events such as science fairs, Campus Connection, math contests, development of Speakers Bureau, etc.
        Priority: High   **Responsibility**: Green,
        Timeline: September 2003   Kennedy-Fletcher
        Status: Ongoing

    5.5 Redesign and produce <u>**departmental newsletters**</u>. Some departments have initiated their own newsletters distributed to faculty, students and their respective alumni/friends. Design and messaging within these publications should be integrated with our overall marketing campaign. *All departmental publications disseminated to prospective students will be coordinated by the IU Kokomo Office of Communications and Marketing.*
        Priority: High   **Responsibility**: Damler, Green
        Timeline: October 2002
        Status: Arts & Sciences, Business and Nursing complete;
                    Education on hold

5.5 **Have a plan for marketing and announcing each new degree program** as well as allocate resources to current programs that attract large enrollments such as business, education and nursing.

Priority: High **Responsibility**: Damler, Green,
Timeline: On-going Stephenson
Status: On-going

5.5 **Develop a master calendar of annual department recruitment activities.** Academic department participation in various events — such as VIP Days, school visits, as well as timely written communication to prospects — is essential. A calendar of events and expectations will support academic commitments to recruitment.

Priority: High **Responsibility**: Green, Kennedy-Fletcher
Timeline: On-going
Status: In development

STRATEGY 6 **Develop a Merit-Based Scholarship Program** to attract the IU Kokomo student profiled by Carnegie.

6.1 Identify high school students in the B to B+ range and offer 55 new 4-year continuing scholarships which will enhance or leverage the likelihood of these applicants enrolling at IU Kokomo.

Priority: Very High **Responsibility**: Tharp, Kennedy-Fletcher
Timeline: September 2002
Status: Complete

6.2 Coordinate the selection of all endowed scholarships available to freshmen to maximize the use of total merit scholarship funds by the Admissions Office.

Priority: High **Responsibility**: Tharp, Kennedy-Fletcher
Timeline: November 2002
Status: Complete

STRATEGY 7   **Address Administrative Issues That Impact Marketing the Campus.**
Marketing the campus goes beyond promotion. The research and auditing process that formed the basis of the plan revealed that there are a variety of administrative and structural changes that the campus can make that would have an exceptionally positive impact on attracting students. They are outlined here.

7.1 **Implement automated course exchange** to increase efficiency in course enrollments and to be more responsive to student needs (Carnegie – non-traditional).
Priority: Very High   **Responsibility**: Tharp, ~~Green~~
Timeline: April 2002
Status: Complete

7.2 **Train campus employees to handle inquiries** and hand them off to Admissions.
Priority: High   **Responsibility**: President, Staff Council;
Timeline: October 2002   President, Professional Staff Council;
Status: Not complete   Kennedy-Fletcher; Fercho
          Priority lowered

7.3 **Create a visitor center**, move the switchboard to Alumni Hall, and "re-sign" the campus.
Priority: Very High   **Responsibility**: Yost
Timeline: August 2002
Status: Complete

7.4 **Develop new admissions standards** to define future target audiences, aligning standards to be in conformance with the CCI agreement.
Priority: Very High   **Responsibility**: Tharp, Green,
Timeline: April 2002   Adm Comm.
Status: Complete

7.5 Develop a "passport" program to **assist denied applicants at IU Kokomo to enroll at Ivy Tech** and work toward eventual transfer to IU Kokomo.
Priority: High   **Responsibility**: ~~Young~~, Tharp, ~~Green~~
Timeline: September 2003
Status: Complete

7.6 Develop a "passport" program with IU Bloomington to take students **who cannot be accommodated at IU Bloomington.**
Priority: Moderate   **Responsibility**: Person, Tharp, Green
Timeline: September 2004
Status: Not complete, priority lowered

– 21 –

CAMPUS-WIDE ACTIVITIES

STRATEGY 1: <u>Develop a "Talking Points" Brochure.</u> A simple brochure will summarize the key marketing messages with supporting facts. The brochure will then be distributed regularly (annually or bi-annually) to all faculty, staff, and key alumni friends (especially those in high schools). Recipients will be encouraged to tout these points regularly as they are out and about in the community.
Priority: Moderately High   **Responsibility**: Damler, Tharp
Timeline: October 2003
Status: Not complete, priority lowered.

STRATEGY 2: <u>Continue a Research-Based Approach to Developing and Executing Strategic Marketing Initiatives.</u> Research has formed the basis of this plan. It is critical that research results continue to drive informed decision-making regarding the strategies and tactics of the effort.

    2.1   Respond to findings from the <u>Image and Perception Study.</u>
        Priority: High   **Responsibility**: Proudfoot, Damler
        Timeline: Done
        Status: Complete

    2.2   Conduct <u>Message and Literature Testing Focus Groups</u> to guide the development of publications and the marketing messages.
        Priority: Done   **Responsibility**: Proudfoot, Damler
        Timeline: Done
        Status: Complete

STRATEGY 4: <u>Advertise.</u> Create a new direction with heavy emphasis on communicating Indiana University Kokomo's marketing messages, securing professional placement recommendations from Perkins-Nichols Media currently on contract with OCM. A plan will be developed based upon highest impact and limited funds. May include print, radio/television, outdoor, video, Web and other channels. Will work to differentiate Indiana University Kokomo from competitor institutions. Appeal to traditional and non-traditional prospects where possible.
Priority: Very High   **Responsibility**: Damler, Tharp,
Timeline: September 2002   Proudfoot, Hakes
Status: Complete for 2002–2003 fiscal year.
         Complete for 2003–2004 fiscal year.
         Complete for 2004–2005 fiscal year.

STRATEGY 5: <u>**Establish Speaker's Bureau**</u> for Schools' and Community Utilization. Chancellor Person and former Purdue programs Director Mike O'Hair have initiated speaking engagements to influential organizations throughout the 11-county region. Continue these initiatives and expand contacts to include Indiana University Kokomo faculty presence in the schools and before key groups. Work toward expanded campus opportunities to bring select groups of high school students to campus for special training and seminars in areas of interest.
Priority: High   **Responsibility:** Green, Hightower, Damler
Timeline: ~~February~~ September 2003
Status: Complete

STRATEGY 6: <u>**Take a Strategic Approach to Media Relations.**</u> The top priority of media relations efforts must be the cultivation of IU Kokomo stories that reinforce the marketing messages. Media Relations' mission should be to place these stories in local media on a regular basis. Additional focus should be placed on identifying those stories that will resonate in the 10 counties of our service area outside of Howard County.
Priority: Very High   **Responsibility:** Damler, Stephenson
Timeline: On-going
Status: On-going

STRATEGY 7: <u>**Develop a Campus Style Guide**</u> that outlines the appropriate usage of color, logos and other visual elements to ensure all marketing materials reinforce a unified brand for Indiana University as well as IU Kokomo specifically.
Priority: Very High   **Responsibility:** Damler, Proudfoot, Salerno
Timeline: ~~September 2002~~
Status: In development. Some parts will be determined as a result of the work by the policy committee in conjunction with the Board of Trustees

STRATEGY 8: <u>**Conduct a Media Training Session**</u> for faculty and key staff.
Priority: High   **Responsibility**: Damler, Proudfoot
Timeline: April 2003
Status: No progress

STRATEGY 9: <u>**Conduct a Marketing Retreat**</u> for Academic Council each summer.
Priority: High   **Responsibility:** Damler, Proudfoot
Timeline: June 2004
Status: Complete June 2004, planning June 2005

EXECUTION AND EVALUATION

To orchestrate major changes and dramatically improve outcomes will require a campus-wide strategy. To coordinate and communicate during a major marketing thrust requires internal dialogue that is on-going. Strategies will be adjusted as needed to improve outcomes and to cope with changing environments.

STRATEGY 1 Organize and Communicate for Effectiveness.

   1.1   Organize a campus marketing manager group that meets regularly, tracks progress, and ensures execution of the plan.
   Priority: Very High   **Responsibility**: ~~Dailey~~
   Timeline: Immediate, On-going
   Status: See campus-wide activities #4 page 22

   1.2   Provide regular updates to campus stakeholders regarding recruitment activities and opportunities to collaborate. Report outcomes as they are achieved. IU Kokomo OCM to develop overview of progress to date following timeline outlined immediately below.
   Priority: Very High   **Responsibility**: Damler, Tharp,
   Timeline: January & August 2003   Green
                 January & August 2004
                 January & August 2005
   Status: On-going

STRATEGY 2: Evaluate for Effectiveness.

   2.1   Evaluate on-going research and data to support decision-making.
   Priority: Very High   **Responsibility**: Dailey, Damler, Tharp,
   Timeline: Immediate, On-going   ~~Young~~
   Status: On-going

   2.2   Evaluate sustainability of the plan
   Priority: Very High   **Responsibility**: Dailey, Damler, Tharp,
   Timeline: January 2003, Annually   ~~Young~~
   Status: On-going

   2.3   Utilize student headcount as the primary benchmark for the evaluation of the effectiveness of the plan
   Priority: Very High   **Responsibility**: Damler, Proudfoot, Tharp
   Timeline: Each fall
   Status: Complete fall 2002, 2003, 2004, 2005

IU Kokomo Fall Enrollment Projections

	2001	2002		2003		2004		2005		
	Actual	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected Plan	Budget Office
Undergrads										
Fresh	978	954	982	1006	970	979	964	963	994	980
Soph	631	720	658	771	662	802	813	784	823	786
Junior	288	308	300	332	351	287	356	333	366	340
Senior	378	391	397	415	418	437	447	445	457	382
Total	2275	2373	2337	2524	2401	2505	2580	2525	2640	2488
Grads	130	125	134	113	125	72	105	77	100	75
Specials										
Non/Trans	88	125	90	35	125	43	33	25	30	65
Grad Spec	92	90	100	111	90	99	111	81	100	109
HO	156	140	150	173	149	184	173	187	180	170
Total	336	355	340	319	364	326	317	293	310	344
GRAND TOTAL	2741	2772	2811	2954	2890	2903	3002	2895	3050	2907

Assumptions:

1. +60 undergrads each yr. (30 new & 30 con't.)

    a) annual new student growth 2002 to 2005 = +4%/yr.

    b) annual total undergrad growth 2002-2005=+ 2.5%/yr.

2. fall to fall retention must be in the 55-58% range

    Ex. Fall 2001 cohort = 676

    @ 2000 rate of 53% = 358; @ 55% = 372; @ 58% = 392

3. Overall growth 2002 - 2005 impacted by loss of PSP

+ 289 = +12%

- 110   PSP

NET   179 = + 8%

FALL NEW MATRICS BY SCHOOL

Program	Projected	Actual			
	2005	**2004**	**2003**	**2002**	**2001**
AHLT	64	64	61	37	28
BUS	65	65	64	55	85
EDU	63	61	59	61	77
NSAA	75	72	72	49	38
NURS	75	70	45	36	48
SCS	18	18	12	9	8
SPEA	22	22	25	27	27
SOAS					
A.A./Other	0	1	4	3	1
Bio/et.al.	35	37	20	15	14
Chem	4	1	4	4	3
Comm	19	19	8	13	17
Eng/Hum	14	14	6	15	9
CIS	13	11	11	5	16
Math	5	8	3	2	4
Hist/Poly Sci	22	19	n/a	n/a	n.a
Pre OT/PT	2	2	9	8	8
Psych	27	27	27	18	18
Soc/et.al.	7	7	16	16	9
	148	146	108	99	99
UDIV	120	102	127	119	121
PSP	0	0	64	48	50
TOTAL UNDERGRADUATES	**650**	**620**	**637**	**540**	**582**

Other

	2005	2004	2003	2002	2001
Grad Special	11	11	13	4	10
Non-Deg/Tran	16	16	15	15	35
ACP/HO	162	162	167	143	146
SPEA grad	2	2	0	2	0
BUS grad	10	9	2	3	0
BUS grad spec	4	4	5	3	0
EDU grad	0	0	1	2	3
EDU grad spec	15	14	2	4	3
Total Other	220	218	205	176	197

Grand Total	**870**	**838**	**842**	**716**	**779**

Note	2005	2004	2003	2002	2001
AHLT					
Radio		32	32	17	6
Dent. H		18	18	16	13
Other		14	11	4	9

COAS UNDERGRAD FALL ENROLLMENT BY MAJOR

		Actual		Projected		
		2001	2002	2003	2004	2005
Associate of Arts	New	1	0	0	0	0
	Cont	12	10	10	10	10
	Total	13	10	10	10	10
Biology	New	16	17	19	22	22
	Cont	48	48	50	52	54
	Total	64	65	69	74	76
Chemistry	New	4	5	7	10	11
	Cont	6	7	9	9	11
	Total	10	12	16	19	22
Communication Arts	New	19	21	24	30	34
	Cont	37	37	40	41	46
	Total	56	58	64	71	80
English & Humanities	New	9	9	11	13	13
	Cont	41	41	43	44	45
	Total	50	50	54	57	58
Mathematics	New	6	6	7	8	8
	Cont	5	5	6	7	8
	Total	11	11	13	15	16
Information Systems	New	20	20	22	25	27
	Cont	53	53	55	56	59
	Total	73	73	77	81	86
Psychology	New	26	27	28	30	32
	Cont	61	61	63	64	67
	Total	87	88	91	94	99
Sociology	New	4	4	4	4	4
	Cont	21	21	21	21	21
	Total	25	25	25	25	25
Social & Behavioral Science	New	10	10	10	10	10
	Cont	29	29	29	29	29
	Total	39	39	39	39	39
Pre-Physical Therapy	New	6	3	3	3	2
	Cont	9	4	3	2	2
	Total	15	7	6	5	4
College of Arts & Science Total	New	121	122	135	155	163
	Cont	322	316	329	335	352
	Total	443	438	464	490	515

AREA HIGH SCHOOL MATRICULANTS

	Projected					Actual							
	2002 Fa	2003 Fa	2004 Fa	2005 Fa	2005 Fa	2004 Fa	2003 **Fa**	2002 **Fa**	2001 Fa	2000 Fa	1999 Fa	1998 Fa	1997 Fa
Howard Co.													
Kokomo	62	64	40	55		64	41	48	60	59	32	74	56
Northwestern	21	21	20	20		12	20	17	21	26	19	16	21
Western	28	28	28	33		43	32	29	28	27	38	37	34
Eastern	20	20	15	19		8	19	10	20	21	20	18	12
Taylor	14	14	15	19		21	24	11	11	16	17	19	23
Kokomo C	3	3	2	2		4	1	2	3	0	3	1	0
Temple Christian	2	2	2	2		0	1	0	2	0	1	0	4
Total	150	152	122	150		152	138	117	145	149	130	165	150
Miami Co													
Peru	20	20	15	15		23	14	14	20	28	9	16	11
Maconaquah	17	17	15	15		14	17	14	14	22	16	11	11
North Miami	7	7	7	7		6	11	8	7	3	8	6	5
Oak Hill	8	8	8	8		5	9	10	6	12	14	9	8
Total	52	52	45	45		48	51	46	47	65	47	42	35
Cass Co													
Logansport	17	17	13	13		17	17	18	15	7	14	14	27
Pioneer	4	4	4	4		2	4	5	1	9	4	4	3
Lewis Cass	13	13	9	9		14	8	14	13	14	22	16	18
Total	34	34	26	26		33	29	37	29	30	40	34	48
Tipton Co													
Tipton	16	16	18	18		13	20	12	16	10	12	18	15
Tri-Central	10	10	12	12		11	13	14	10	13	11	12	10
Total	26	26	30	30		24	33	26	26	23	23	30	25
Hamilton Co													
Noblesville	4	4	3	3		1	7	2	4	3	7	5	3
Marion-Adams	7	7	5	5		1	4	2	2	7	0	5	2
Hamilton Hts	11	11	8	8		7	9	7	11	14	3	13	4
Westfield	6	9	7	7		5	5	6	6	10	4	2	2
Ham. Southeast	1	0	2	2		1	2	0	1	0	0	0	1
Carmel-Clay	1	2	0	0		0	0	0	1	1	0	0	0
Total	30	33	25	25		15	27	17	25	35	14	25	12
Grant Co													
Marion	6	6	3	10		10	6	5	6	4	3	5	4
Mississinewa	6	6	3	3		1	5	3	6	3	3	2	5
Eastbrook	2	2	2	2		0	2	1	2	0	2	1	3
Madison Grant	2	2	2	2		9	2	1	2	3	1	3	6
Total	16	16	10	17		20	15	10	16	10	9	11	18

- 28 –

AREA HIGH SCHOOL MATRICULANTS

	Projected					Actual								
	2002 Fa	2003 Fa	2004 Fa	2005 Fa		2005 Fa	2004 Fa	2003 Fa	2002 Fa	2001 Fa	2000 Fa	1999 Fa	1998 Fa	1997 Fa
Carroll Co														
Delphi	1	1	1	1			2	2	0	0	2	2	1	2
Carroll	7	7	7	7			14	7	6	8	7	8	10	9
Total	8	8	8	8			16	9	6	8	9	10	11	11
Clinton Co														
Frankfort	4	4	5	5			2	5	6	0	2	4	8	3
Rossville	1	1	1	1			2	0	3	1	1	1	2	0
Clinton Cen	5	5	5	5			1	5	2	4	4	6	12	12
Clinton Pra	0	0	0	0			2	0	0	0	2	0	0	0
Total	10	10	11	11			7	10	11	5	9	11	22	15
Fulton Co														
Caston	3	3	3	3			8	4	4	3	9	1	4	4
Rochester	4	4	7	7			4	9	7	4	3	4	3	2
Total	7	7	10	10			12	13	11	7	12	5	7	6
Wabash Co														
Wabash	1	1	1	1			0	2	0	1	3	5	2	1
Northfield	1	1	1	1			0	2	0	1	2	1	1	2
Manchester	1	1	1	1			0	0	0	1	0	0	0	1
Southwood	8	8	5	5			1	3	3	8	2	4	3	2
Total	11	11	8	8			1	7	3	11	7	10	6	6
Madison Co														
Alexandria	4	4	3	3			0	0	1	4	3	0	1	1
Elwood	5	5	5	5			2	4	4	5	12	4	10	7
Frankton	0	0	0	0			0	0	2	0	2	3	0	2
Total	9	9	8	8			2	4	7	9	17	7	11	10
Other (GED Out-Of-State Home School)	18	18	22	22			15	16	8	18	23	26	16	21
Total All Schools	371	376	325	360			345*	355	299	346	388	332	380	357

2004 includes no GSP matrics which = 30 in 2003

INDIANA UNIVERSITY KOKOMO
RETENTION ACTION PLAN (RAP)

RAP Development Process:

The development process of a Retention Action Plan for the Kokomo campus has operated under the following assumptions:
1.   The three-year Retention Plan submitted by the campus and accepted by Vice Presidents Palmer and Nelms and by the IU Board of Trustees still forms the basis for the campus' budgeted retention efforts.
2.   The key elements of the approved plan are as follows: 1) funding for additional lecturers in the Learning Communities and other areas of the first-year curriculum; 2) continuing support for Supplemental Instruction and other additional tutoring; 3) increased support for advising, including a half-time advisor in Arts and Sciences, upgrading the Business advisor from.50 to full-time, and adding a full-time advisor in University Division; 4) a mathematics refresher program to assist students in maximizing their progress before they formally begin classes at the intermediate algebra level; and, 5) a minority recruitment and support program that has just begun its implementation and is already showing promise of success.
3.   Although assigning cause and effect is a tricky business, it appears that these efforts have contributed greatly to the campus' freshmen retention success this past year. Therefore, the campus anticipates continuing these efforts and expanding some of them, providing additional funding is available.
4.   Additional retention efforts as outlined below will be pursued based on the ability of the campus and its departments to redirect their energies, finding new directions and capacities through intentional planning, reshaping of program priorities and efforts, and inter-unit collaboration and synergies.

Charged by Chancellor Ruth Janssen Person to develop a campus-wide Retention Action Plan, Vice Chancellor for Academic Affairs Stuart Green initiated a four-stage process that has involved representation from all campus constituencies, including students and alumni. Stage one focused on the role of academic programs in creating and sustaining environments that would integrate students' academic and co-curricular activities beginning with their pre-collegiate engagement during the admissions process and continuing through all phases of the students' academic career, including their role as alumni. The deans/chairs received copies of the materials shared at the IU Student Success/Retention Retreat. After reviewing these materials and discussing the current status of IU Kokomo's retention efforts, the deans/chairs were asked to place their individual unit's retention plans in the larger context of a matrix of interrelated activities along a timeline spanning the entire undergraduate sequence. While asking the unit academic deans and chairs to look across the entire scope of the undergraduate timeline, a particular emphasis was placed on the sophomore year where IU Kokomo continues to experience unacceptably high rates of attrition. In addition to the specific activities of the academic units themselves, each dean/chair was asked to include areas in which their unit might or should interact with other campus entities that they believed would enhance student retention.

Finally, consistent with the campus' reinvention of itself as the region's applied baccalaureate institution, and in response to recent research findings that demonstrate the need to draw clearer connections between the classroom and students' lives and work, we asked the deans/chairs to pay particular attention to the development of experiential and applied learning opportunities, especially at the sophomore level and continuing through to the senior year. Such experiences may include internships, service learning, job shadowing, mentoring, field-based research projects, and reinvigorated senior capstone courses. Deans/chairs have submitted drafts of their unit matrices (see attached).

Stage two of the process involved a series of meetings with a broader representation of the campus community. A task force made up of representatives from Student Services, Campus Life, Academic Council, Staff Council, Professional Staff Council, Student Body, and Alumni Council met three times to review retention literature, current campus plans and practices, practices from other IU campuses, in particular IUPUI, and to discuss, rate, and recommend a range of retention practices for inclusion in the campus RAP. A summary of the RAP Task Force's recommendations follows in priority order below:

The campus will develop an integrated retention matrix that will incorporate the core elements of its retention plan in the areas of Community Building and Engagement, Academic Programs and Support Services, and Faculty/Staff Development. Each academic unit's individual retention matrix will further expand on these core elements. Once completed and approved by the Chancellor, the matrices will be distributed campus-wide and will form the basis for the campus' retention efforts for the next two to three years.

Community Building:
1.   Freshman Learning Communities (LCs) and unit-specific Freshman Seminar Courses are at the center of the freshman retention initiative. The campus recognizes the need to provide transitional experiences that assist students to adjust to college-level coursework and the freedoms, opportunities, and responsibilities of collegiate life. These experiences will be available through campus-level Learning Communities or through seminars offered by individual academic units. The campus' retention success with LCs suggests we continue to emphasize this approach in terms of curriculum and funding.
2.   Creation of a Campus Life/Academic Programs Committee to focus on enhancing coherence throughout our students' undergraduate experiences. We anticipate forming this committee in spring 2003 and using it to identify common goals and strategies for enhancing connections between academic and co-curricular dimensions. This committee will also explore possible budgetary benefits from streaming academic and student-life objectives.
3.   Enhanced career exploration opportunities, including internships, service learning, job shadowing, coop-programs, external career mentoring, and SIGI+ career analysis. The task force strongly held that the early and continuing connection between study and career was critical to students' aspirations and, hence, their retention and success. It is anticipated that a career component will be developed and implemented by each academic unit in collaboration with IU Kokomo's Office of Career Service that invites student exploration of the career opportunities

related to their chosen filed of study at deepening levels of engagement throughout a student's years of study.

Academic Programs and Support Services:
1.   The development and implementation of needed academic programs. Based on campus research, a significant number of students (46%) contemplate leaving IU Kokomo, many because they cannot pursue their desired academic majors in Kokomo. Given current budget circumstances, the implementation of new, even low cost programs will pose questions of priorities from among other retention and non-retention related issues.
2.   Expand the role of full-time lecturers in English/writing (2 additional lecturers).
3.   Continue Supplemental Instruction (SI) but modify it to encourage units to require mandatory participation through the first exam period and to continue mandatory participation based on unsatisfactory performance. IUPUI has had success with this approach, and we recommend that it be adapted to the needs of our campus. Funding is in place to continue SI.
4.   Expand other tutorials in accounting, biology, and other subjects that have not traditionally been covered under SI. Funding will be required to meet the demands for additional tutoring across a wider range of subject areas.
5.   The Mathematics Refresher Program earned strong support. The task force recommended that an additional refresher at the M007 level be developed as soon as possible. It was seen as critical for students who could be ready for M007 and avoid additional remediation at lower levels. Funding for the former is in the budget, expanding the refresher to include M007 may require additional funds for development and implementation.
6.   Continued use of IU CARE or its PS equivalent was seen as important for tracking student progress
7.   Automated Course Exchange and Project ACCEL give students greater access to desired courses and academic deans/chairs greater control of the registration process
8.   Our campus has initiated a program called the Star Scholarship Program in order to attain quality, well-prepared students. This initiative funds $500 annual scholarships for students with honors diplomas who maintain an appropriate academic GPA.

Faculty/Staff Development:
1.   Offer workshops for faculty that focus on teaching strategies that respond to learning characteristics of different students, in particular freshmen and returning adult students. This will be supported out of the campus Center for Teaching Excellence.
2.   Continue the development of evaluative tools for assessing the success of our retention efforts, including focus groups, in-class assessment, exit interviews, etc. The campus will also consider working with NCHEMS and the Center for Assessment of the Freshman Year to assess its first-year program.
3.   Continue to support the shift towards developmental/holistic advising among professional counselors and faculty advisors.

**INDIANA UNIVERSITY KOKOMO
STUDENT SUCCESS/RETENTION MATRIX**

**Pre-College
First Year
Second Year
Third Year
Fourth Year
Fifth year and Alumni
Admissions Office**
Implement campus recruitment plan collaboratively with academic units support (see addendum)
Participate in assessing the dissonance between students' expectations and experiences
Work with Faculty Senate Admissions Committee to assist dismissed students
Work with Alumni to identify and recruit promising students
Academic Units: Academic Affairs, Allied Health, Arts and Sciences, Business, Continuing Studies, Education, Nursing, SPEA, University Division
Establish relationship with students during admission process through campus visitation, letters, small group meetings and provide orientation to new students. Also engage students through Speaker's Bureau. Also, work with area high schools to facilitate more college level work in the senior year, per AACU's recommendation.
Focus on freshmen transition programs and activities that encourage student engagement and involvement both in and out of the classroom
Develop and implement activities focusing on connecting students with their major and faculty and students in the major. Also begin career focus.
Continue career focus, adding activities such as mentoring, job-shad-
owing, etc.
Develop and implement transition to work activities comparable to freshmen transition programs.
Work with Alumni to identify and recruit promising students

Learning Enhancement Center/SI/ Tutoring
Provide assessment student academic preparation and house SI and other tutoring

Center for Teaching Excellence
Provide workshops on teaching new freshmen, adult learners, and in an online environment.
Also, encourage the development of a SOTL initiative on campus.

Student Services: Campus Life, Career Services, Registrar
Students learn about these services during orientation.

Create Campus Life/ Academic Programs Committee
Make SIGI+ available in freshman year

Work with academic units to enhance internship and SL opportunities for all students

Honors Program
Participate in HS visitations and invites promising students to participate in Honors activities
Work with academic units and Campus Life to identify and provide curricular and co-curricular experiences that enhance community and engage our brightest students
Work with Career Services to place Honors students in internships
Work with Seniors to recruit new Honors students
Maintain relationship with Alumni for fund raising and recruiting; hold semi-annual reunions

External Relations/Alumni Relations
Promotes campus message/story through the implementation of campus marketing plan
Serve as liaison between academic units' and external constituents to engage larger community in student's experiential learning through promoting activities like internships in the larger community.
Provide internships in the different operational areas of External Relations

Institutional Research
Work with academic and other campus units to assess effectiveness of retention efforts, including tracking emerging trends in campus retention data.

Mathematics Refreshers
Provide pre-matriculation instruction for new admits
Provide math refreshers prior to students taking M117 or M007

Learning Communities/
Freshmen Seminars
Participate in orientation
Expand from 3 to 4 sections per year; hire additional lecturer to support LC and other freshman science courses
Work with academic units to identify transferable community-building approaches for upper-level courses

Faculty/Staff Development
Ongoing

New Academic Program Development
Ongoing

Barriers to Retention and Students Success:

Several years ago the campus reviewed its academic policies and practices in an effort to make the Bursar, Registrar, Admissions, and Financial Aid Offices more user/student friendly. The recommendations of this review have been implemented, including moving the above offices

into proximity of each other, improving services and response time of these offices, creating a more central and effective welcome center for the campus, as well as numerous adjustments to the practices of these offices and many others. Thus, while the campus clearly has areas for new initiatives and room for improvement, the work we did a few years ago has removed most, if not all of the policy/practice barriers that got in the way of student success/retention.

At the same time, other kinds of barriers still persist. The principle barrier noted by several members of the RAP Task Force is the lack of effective communication and collective planning among different responsible campus entities, especially between academic program administrators and Student Services staff. While the above recommended committee may serve to create a structure for collaboration, task force members felt that a greater effort was needed to bring these two groups together with facilitators around a set of mutually shared issues that foster trust, shared commitments, and the development of new perspectives, ideas, and strategies that will shift academic programs and campus life from passive to more active and dynamic engagements with our students. In order to achieve these ends the campus and the university should consider a retreat aimed at forging better collaborations between academic and campus Student Services personnel. IU's Bradford Woods could be used as a setting for team-building and agenda setting for all IU campus representatives.

A second barrier is the lack of resources to build new programs and to attract and retain quality faculty and staff. As many students cannot get the majors they desire at IU Kokomo, they simply will not stay on our campus. While we have added several new programs, we need additional undergraduate programs, for example in secondary education, political science/history, as well as additional graduate programs.

Given that all commuting students are identified by Alexander Astin as at-risk, we assert that the lack of a residential option for 10% to 20% of its students is a barrier to retention. For our younger students in particular, life in a residential hall would, as it does in Bloomington, enhance their chances for success and, hence, retention.

The Indiana University Board of Trustees agreed unanimously Sept. 20 to initiate a plan that would require first-year students enrolled at IU Bloomington to live on campus. The policy, which would begin with the entering class in the falloff 2003, also includes several categories of exemptions.

"We're sending a strong message to students who come to Indiana University," said IU President Myles Brand. "We're telling them that we care about students, that we are providing the best possible learning and social environment. This policy says we care and we want them to succeed. It's a positive message in this day and age."

Research indicates that students who live on campus during their first year perform better academically, are more likely to stay in school and graduate, participate in more events of all types on campus, show greater gains in autonomy, intellectual orientation and self-concept, and are overall more satisfied with their college experience. (See additional appended material.)

- 35 –

Our inability to support multiple sections of course in the day and evening, owing to budget and IU's policy on low-enrolled sections, creates scheduling problems for commuting students as they try to organize their schedules. While not desiring the proliferation of low enrolled sections, limitations on course availability continues to be a challenge.

An additional barrier is a faculty rewards system that does not valorize student advising and out-of-class engagement with students in a significant and tangible way. Defined as service, these activities remain at the bottom of the priority ladder, below research and teaching at IU, IU Kokomo and in higher education in general.

SIS Barriers:

1. The implementation of SIS has affected our ability to manage some of the data related to admissions (e.g., posting and distributing placement test results); however, as advisors won't have access to SIS for advising purposes until 2004, it's difficult to predict what impediments they will face that may negatively affect student retention..

2. Automated Course Exchange not as robust and student friendly as current system

3. GradPact dropped

4. Paper grade notifications to end

5. Touch-tone registration will be dropped

6. Touch-tone payment may be dropped

7. Borrower-based (BBAY) will cease

8. PS cannot do mid-term grades

9. The academic advising module in PS does not have the functionality of IU CARE

10. Waitlist in PS does not have the comprehensive functionality of ACE

11. Other campus specific policies such as academic forgiveness policies might have to be changed

Revised 1-30-03

Below are quotes from Sharon Brehm to the Board of Trustees on a proposal to require more freshmen to live in dormitories. These comments are presented here owing to their relevance to the larger issue of creating residential opportunities on regional campuses:

Housing for First-Year Students:
A Briefing Paper

Over the last several decades, virtually all the research studies done by higher education scholars show unequivocally that living on campus positively influences student success (Astin, 1977, 1993; Kuh, 2000; Kuh, Schuh, Whitt & Associates, 1991; Pascarella, Terenzini & Blimling, 1994). This paper summarizes the relevant research findings comparing the effects of living on and off campus, including national data as well as results from Bloomington campus-specific studies. The paper concludes with a recommendation for Bloomington campus housing policy based on the implications of this research.

National Data

Overall, students who live on campus are more likely to succeed in a variety of desirable ways than their counterparts who commute to school. Specifically, students who reside on campus:
1.   Are more likely to stay in school (persist) and graduate from college.
2.   Interact more frequently with faculty members and peers in informal settings.
3.   Participate more frequently in extracurricular, social, and cultural events on campus.
4.   Are more satisfied overall with their college experience.
5.   Exhibit greater gains in autonomy, intellectual orientation, and self-concept.
6.   Exhibit greater gains in appreciation of aesthetic and cultural values.

In addition, students who reside in certain types of campus housing units, such as those organized around specific academic or educational themes (which at IU would include Special Interest Floors as well as the Briscoe Wellness Center, Collins Living Learning Center, and the Foster International Center), benefit even more by living on campus. That is, in addition to the list of advantages over commuters outlined in the preceding paragraph, students who reside in educational theme units:

1.   Perceive the campus environment to be of overall higher quality.
2.   Perceive their living environment to be more intellectual.
3.   Report more frequent substantive interactions with faculty members.
4.   Earn higher grades than peers living elsewhere on campus or living off campus.
5.   Demonstrate higher persistence and graduation rates than other groups.
6.   Report fewer incidents of excessive alcohol use.

The positive impact of living on campus is a function of the nature of the social interaction that occurs in the residential setting, the close proximity to mature role models (such as faculty members, academic advisors, and residence life staff), and easier access to other institutional resources for learning (such as cultural and performing arts venues, the student union, and

recreational facilities). For example, students who live on campus are much more likely to be involved with their peers in group activities that take place on campus and see their professors more frequently outside of the classroom (Billson & Terry, 1982; Chickering, 1974). This greater involvement in the life of the campus community promotes a sense of "mattering" in the environment and reduces feelings of being "marginalized" (Schlossberg, 1989). This leads to a greater degree of social integration into the fabric of the campus, which is considered an important factor in retention and graduation (Tinto, 1987). The single most important factor for first-generation student engagement during their first year is living on campus (Pike & Kuh 2002). In fact, the results from a large, continuing study of college students demonstrates that living on-campus in a residence hall increased a student's chance of persisting in college and graduating by 12 percent (Astin, 1977).

Living on campus also positively affects intellectual and personal development in areas such as intellectual orientation (Chickering & Kuper, 1971), academic and social self-concept (Baird, 1969; Chickering, 1974; Pascarella 1985), and self-esteem (Marron & Kayson, 1984). In addition, compared with commuters, students who live on campus also develop a deeper understanding of and appreciation for aesthetic, cultural and intellectual values (Astin, 1977; Chickering & Kuper 1971). Moreover, students who live on campus show greater gains in such cognitive development areas as critical thinking and reading comprehension, with comparable gains in mathematics reasoning. The results that favor students living on campus hold true even after controlling for student characteristics such as gender, race, socioeconomic status, aptitude, and pre-college values.

Indiana University

Students who live on campus at IUB perform better academically (achieve a higher GPA) than students who live off campus. For example, in the Fall of 2001 the cumulative GPA for all students living on-campus was 3.11 as compared to 2.97 for off campus students. The numbers favoring on-campus students at IUB are consistent over the past eight years. Because on-campus students represent a large proportion of all first-year students, and first-year students obtain overall a lower GPA than more advanced students, the advantage to living on-campus is quite strong

Retention rates are also higher for IU students who start college by living on campus. For the 2000 and 2001 cohorts, students living off-campus had an 88% first-to-second semester persistence rate, compared to 94% of on-campus students. Similarly, first-to third-semester persistence rates are higher for students who live on campus during their first semester, with approximately 85% of on-campus and 75% of off-campus residents from the 2000 cohort persisting to the third semester.

Recently developed statistical models show that the likelihood of persisting, either from first to second or from first to third semester, is greater for students who start college living on campus (either in an educationally themed community or standard residential hall), even after controlling for a variety of factors, such as academic ability, financial aid, and socio-economic status. Using

– 38 –

the 2000 cohort, the probability of persisting to the third semester increases by approximately 6% for students who live on campus during their freshman year.

In terms of engagement with the collegiate experience, as reflected by IUB scores on the National Survey of Student Engagement (NSSE), students who live on campus report that relationships with other students are more friendly and supportive. They also feel that IU provides them with the support to thrive socially. Of particular importance is the NSSE result that on-campus residents report having had "serious conversations with students who are very different in terms of their religious beliefs, political opinions, or personal values" to a greater extent than do their off-campus counterparts.

Finally, the quality of IU's student housing has not gone unnoticed off campus. Based on data collected from a random national sample of high school guidance counselors, the 2002 edition of The Unofficial, Unbiased, Insider's Guide to the 320 Most Interesting Colleges cites IU as a top school in terms of offering the "best freshman housing."

Recommendation

Students who start college living on campus realize greater benefits almost across the board, which advantage them later in their college years. Therefore, it is proposed that, beginning with the entering class of 2003, all undergraduate first-year students enrolled at Indiana University Bloomington be required to live on campus during their first year. Exemptions from this requirement will be considered in terms of the following categories:

1. Any first-year student whose parent(s) or guardian lives within 25 miles of campus and chooses to live at home may select not to live on campus. This individual will be required to provide proof of residency.

2. Any transfer student who lives within the 25-mile radius may select not to live on campus. Transfer students outside this radius who are entering their second semester of study (15 credit hours) or part-time students will also be exempt. Proof of residency will be required.

3. Any student who will be 21 years of age prior to the start of first semester will be exempt as will any student who is married or who would qualify under the university guidelines for domestic partnership. Documentation will be required.

 4. Fraternities will be defined as on-campus housing until a more thorough review of campus practices/policies regarding the timing and standards for men's recruitment and supervision within the chapter house can be completed.

5. In addition to the above categories, requests for exemptions from the general policy will be considered for medical, cultural, financial or special circumstances. Documentation for exemption and requests for exemption must be submitted 30 days prior to the start of the semester.

Currently, the Bloomington campus houses 92% of all first-year students. This proposal will increase the percentage to 98% for an effective housing yield of 405 students from an anticipated class of 6750. This number could be accommodated in the current residence hall configuration.

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2005 New Student Projections
Appendix F

Calculation

Fall 2005

Ratio

Fall (F)	979
x	76%
Spring (S)	774

Ratio

Spring (S)	774
x	38%
Cont Spr Spr/Sum	294
3 yr avg. Spring as % of	30%
294	
30%	980

All Freshmen   **Projected**

2005

New Fa	550	56%
Cont. Spr. & Spr/Sum	294	30%
Cont. Sum	40	4%
Stop Outs	106	10%
Total	980	

Ratio of Spring Freshmen Compared to Fall Freshmen

Spring (S)	S-04	?	S-03	748	S-02	710	S-01	768	S-00	747	S-99	671	S-98	781
Fall (F)	F-04	979	F-03	1006	F-02	954	F-01	978	F-00	938	F-99	921	F-98	979

	74.40%	74.40%	78.50%	79.60%	72.90%	79.80%

Ratio of Spring Continuing Students *(including Spring to Summer to Fall)*

Fall (F)	F-04	302	F-03	284	F-02	304	F-01	273	F-00	273	F-99	285
Spring (S)	S-03	748	S-02	710	S-01	768	S-00	747	S-99	671	S-98	781

	40.40%	40.00%	39.60%	36.50%	40.70%	36.50%

Distribution of Total Fall Freshmen

	2005		2004		2003		2002		2001		2000		1999	
New Fall Fresh Matrics			560	57.20%	556	55.30%	472	49.50%	527	53.90%	508	54.20%	447	48.60%
Cont. Spr & Spr/Sum			302	30.80%	284	28.20%	304	31.90%	273	27.90%	273	29.10%	285	30.90%
Cont. Sum I/II Fresh Matrics			47	4.80%	38	3.80%	31	3.50%	43	4.40%	39	4.20%	38	4.10%
Stop Outs			70	7.20%	128	12.70%	147	15.40%	135	13.80%	118	12.50%	151	16.40%
Total			979		1006		954		978		938		921	

*Projection Fall 2004

Step #1 1006 (Fall 2003 Actual) x 77% (Est. ratio of Spring count as a % of Fall) = 775 x 39% = 302

Step #2 302 ext. con't. to Fall = 30% of 5 year avg. (see row #2 Distributino of Total Fall Freshmen); 302 / 30% = 1007

Step #3 Alternative: 556 new fresh matrics (Fall 2003) / 5 year avg. of new matrics @ 52% = 1069