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# Strategic Enrollment Management: Building and Using Data in Decision Making

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Orlando, Florida  
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Session 146

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# Presentation Overview

- Strategic Enrollment Management Components
    - Philosophy and Principles
    - Recruitment Methodology
    - Financial Aid Strategy
    - New Initiatives
    - Definitions
    - Two Examples Using Data
  - Summary
  - Conclusion
  - Questions and Answers
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# SEM Philosophy and Principles

- Student Lifecycle
  - Student Centered
  - Personalized Communication
  - Customized Communication
  - Early, Frequent and Targeted Interaction
  - Seamless Service
  - We don't recruit a freshmen class; instead, we recruit a group of individuals who together comprise a freshmen class.
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# SEM Philosophy and Principles

- Strategic Enrollment Management focuses on the service areas which impact a student's initial and continued enrollment.
  - Organizations which comprise the Office of Enrollment Management include:
    - Admissions
    - Orientation Programs
    - Registrar
    - Research
    - Scholarships
    - Student Financial Assistance
    - Systems Design and Development
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# STUDENT LIFECYCLE



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# Primary Recruitment Goals

- Improve the quality measures of the freshmen class profile.
  - Increase the diversity of the freshmen class, as defined by ethnicity.
  - Increase the international representation in the freshmen class.
  - Maintain affordability for Indiana families.
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# Recruitment Methodology:

- It is everyone's job to recruit and retain students.
    - Be coordinated, strategic and targeted.
    - Recognize the competitive landscape.
    - Develop aggressive, personalized recruitment.
    - Out-work and out-think competition.
    - "Win" mentality.
    - Teamwork.
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# Financial Aid Strategy

- Need-Based Financial Aid
  - Merit-Based Financial Aid
    - Must Align to recruitment and enrollment goals.
    - Must be presented in an easily understood manner to students and parents.
    - Must be coordinated and applied strategically.
    - Must be widely published.
    - Requires outstanding student service.
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# Financial Aid Strategy

- Merit-Based Financial Aid
    - Must be based on high standards.
    - Designed to increase the quality at all levels in the “pipeline” or “funnel”.
    - Requires continual outcome assessment.
  
    - Key Recruitment Point:
      - Parents, students and high school contacts should have a clear understanding of merit-based parameters early in the student selection process.
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# New Initiatives

- Build the pipeline
    - Increase bought name program
    - Create buzz through program
  - Earlier and more frequent communication
    - Direct mail campaigns targeting soph-senior year.
    - Direct mail pieces to populations beginning in 7<sup>th</sup> grade.
    - Increase frequency, strategically.
  - Customized and personalized communication
    - E-mail
    - Direct mail, correspondence from new sources.
    - “push pieces”
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# New Initiatives Continued

- National publications
    - African American student guide
    - Hispanic student guide
  - New marketing approaches and pieces
    - DVD
    - Personalized postcard
    - On-line chat rooms.
  - Enhance web-presence
    - Re-design of admissions web-page, fluid
    - Collegeview.com presence
  - Phone Blitzes
    - Students speaking with prospective students.
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# Definitions!

SEM centers on the integration and improvement of traditional student services, such as recruitment, admissions, financial aid, registration, orientation, academic support, and retention. It is informed by demographic and institutional research, and advanced by media messages and public relations. Ideally, SEM embraces all departments and functions in a comprehensive framework to best serve the student and hence the institution.”

**-AACRAO, *What is SEM?***

**<http://www.aacrao.org/sem13/whatIsSEM.htm>**

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# Definitions!

“Data mining is the process of selecting, exploring, and modeling large amounts of data to uncover previously unknown patterns of data for business advantage.”

**-SAS Institute Inc.**

[http://www.sas.com/software/data\\_mining/](http://www.sas.com/software/data_mining/)

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# Two examples of how we use data to inform our practice strategically

1. To examine and change the admissions parameters to meet our strategic goals.
  2. To modify the scholarship awarding criteria to meet our leveraging and marketing goals.
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# Fall 2006 cohort examined!

## First Semester IU Performance

Test Score	High School Record					
	Top GPA	Next	Middle	Lower	Lowest GPA	SAT only
1300+	3.5	3.1	2.8	2.8	2.4	3.4
1250 - 1290	3.4	3.0	2.7	2.4	2.0	3.1
1200 - 1240	3.3	2.9	2.9	2.5	3.1	3.2
1100 - 1190	3.2	2.8	2.7	2.5	2.4	3.1
1000 - 1090	3.0	2.9	2.7	2.2	2.6	2.9
950 - 990	2.9	2.9	2.6	2.6	2.3	3.0
900 - 940	3.1	2.9	2.4	2.8	2.5	2.8
850 - 890	2.6	2.6	1.9	2.8	3.1	2.6
<850	1.7	2.8	2.9	2.1	1.8	3.2

# Fall 2006 cohort examined!

First Semester IU Performance						
	High School Record					
Test Score	Top GPA	Next	Middle	Lower	Lowest GPA	SAT only
1300+	3.5	3.1	2.8	2.8	2.4	3.4
1250 - 1290	3.4	3.0	2.7	2.4	2.0	3.1
1200 - 1240	3.3	2.9	2.9	2.5	3.1	3.2
1100 - 1190	3.2	2.8	2.7	2.5	2.4	3.1
1000 - 1090	3.0	2.9	2.7	2.2	2.6	2.9
950 - 990	2.9	2.9	2.6	2.6	2.3	3.0
900 - 940	3.1	2.9	2.4	2.8	2.5	2.8
850 - 890	2.6	2.6	1.9	2.8	3.1	2.6
<850	1.7	2.8	2.9	2.1	1.8	3.2

# Deciding Admissions Parameters

Initial Indiana Resident Admissions Standards 2008

ACT	SAT	High School Record					
		Top GPA	Next	Middle	Lower	Lowest GPA	SAT only
29+	1300+	Admit					
28	1250 - 1290						
27	1200 - 1240						
24-26	1100 - 1190						
22-23	1000 - 1090	Review					
20-21	950 - 990						
19	900 - 940						
18	850 - 890						
<18	<850	Deny					

# Modifying Admissions Parameters

Final Indiana Resident Admissions Standards 2008							
ACT	SAT	High School Record					
		Top GPA	Next	Middle	Lower	Lowest GPA	SAT only
29+	1300+	Admit					
28	1250 - 1290						
27	1200 - 1240						
24-26	1100 - 1190		Waitlist				
22-23	1000 - 1090						
20-21	950 - 990						
19	900 - 940			Deny			
18	850 - 890						
<18	<850						

# Deciding Admissions Parameters

Initial Non-resident Admissions Standards 2008							
ACT	SAT	High School Record					
		Top GPA	Next	Middle	Lower	Lowest GPA	SAT only
29+	1300+	Admit					
28	1250 - 1290						
27	1200 - 1240						
24-26	1100 - 1190						
22-23	1000 - 1090			Review			
20-21	950 - 990						
19	900 - 940	Deny					
18	850 - 890						
<18	<850						

# Modifying Admissions Parameters

Final Non-resident Admissions Standards 2008							
ACT	SAT	High School Record					
		Top GPA	Next	Middle	Lower	Lowest GPA	SAT only
29+	1300+	Admit	Waitlist				
28	1250 - 1290						
27	1200 - 1240						
24-26	1100 - 1190						
22-23	1000 - 1090						
20-21	950 - 990						
19	900 - 940						
18	850 - 890						
<18	<850						

# Weekly Admissions Report

Table 2. Applicants by SAT (or Converted ACT) Score

							SAT (or Converted ACT) Score						
		2006 Cohort	2007 Cohort	2008 Cohort	1 yr Δ	1 yr % Δ	2007 Cohort	2006 Cohort	2007 Cohort	2008 Cohort			
		2/15/06	2/15/07	2/15/08			Year End	2/15/2006	2/15/07	2/15/08			
Applicants	>1300	3,954	5,194	<b>6,445</b>	1,251	24%	5,344	Applicants	25th	1030	1040	1070	
	1100-1290	10,122	11,822	<b>13,170</b>	1,348	11%	12,277		75th	1250	1260	1270	
	1000-1090	4,257	4,829	<b>4,899</b>	70	1%	5,175		Mean	1141	1151	1169	
	<1000	4,150	4,385	<b>3,635</b>	(750)	-17%	4,917						
	No Score	917	1,104	<b>1,654</b>	550	50%	819						
	<b>TOTAL</b>	<b>23,400</b>	<b>27,334</b>	<b>29,803</b>	<b>2,469</b>	<b>9%</b>	<b>28,532</b>						
Admits	>1300	3,653	4,763	<b>5,944</b>	1,181	25%	5,083	Admits	25th	1070	1110	1110	
	1100-1290	8,624	9,584	<b>10,601</b>	1,017	11%	10,506		75th	1260	1300	1300	
	1000-1090	3,105	2,547	<b>2,860</b>	313	12%	3,076		Mean	1172	1208	1212	
	<1000	1,995	721	<b>995</b>	274	38%	1,139						
	No Score	49	42	<b>122</b>	80	190%	108						
	<b>TOTAL</b>	<b>17,426</b>	<b>17,657</b>	<b>20,522</b>	<b>2,865</b>	<b>16%</b>	<b>19,912</b>						
Deposits	>1300	276	319	<b>497</b>	178	56%	1,607	Deposits	25th	1030	1070	1080	
	1100-1290	985	1,270	<b>1,422</b>	152	12%	4,024		75th	1220	1230	1260	
	1000-1090	539	548	<b>564</b>	16	3%	1,633		Mean	1124	1156	1170	
	<1000	402	178	<b>179</b>	1	1%	630						
	No Score	2	4	<b>15</b>	11	275%	50						
	<b>TOTAL</b>	<b>2,204</b>	<b>2,319</b>	<b>2,677</b>	<b>358</b>	<b>15%</b>	<b>7,944</b>						

# Fall 2008 enrollment projections using historical ratios or percentages

Projected Enrollment, by Yield Method		Current (2/25/08) Applicants	Expected Future Applicants	TOTAL
	Applicants	29,870	925	30,795
Admits	Current Admits	20,656		
	Expected Admits	791	194	
	Subtotal Admits	21,447	194	21,641
Projected Enrollment	From Current Admits	7,065		
	From Expected Admits	255	80	
	From Summer Starters		231	
	<b>TOTAL Enrolled</b>	<b>7,320</b>	<b>311</b>	<b>7,631</b>
	<b>Target</b>			<b>7,150</b>

# Fall 2008 enrollment projections using logistical regression models

Fall 2008 Enrollment Projection, regression method

Primary projection	In Fall 2008 Applicant Pool, February 22, 2008			Historical applicants after February 22			Summer Starters	Total			
	Count	Yield	Projected Enrollment	Count	Yield	Projected Enrollment	Historical Enrollment	Count	Yield	Projected Enrollment	
Indiana Resident	10,990	39%	4,292	578	7%	43	176	11,744	38%	4,512	
Out of State	18,697	16%	2,920	491	8%	37	9	19,197	15%	2,966	
Residency not determined	161	11%	18	22	0%	-	-	183	10%	18	
<b>Total</b>	<b>29,848</b>	<b>24%</b>	<b>7,231</b>	<b>1,091</b>	<b>7%</b>	<b>80</b>	<b>185</b>	<b>31,124</b>	<b>24%</b>	<b>7,496</b>	
<b>Projected Residency</b>	<b>Projected Enrollment</b>	<b>Percentage</b>	<b>Projected Ethnicity</b>				<b>Projected Enrollment</b>	<b>Percentage</b>			
Indiana Resident	4,512	60%	African American				348	5%			
Out of State	2,966	40%	Latino				196	3%			
Residency not determined	18	0%	All others				6,952	93%			
<b>Total</b>	<b>7,496</b>	<b>100%</b>	<b>Total</b>				<b>7,496</b>	<b>100%</b>			

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# The second example of how we use data to inform our practice

To modify the scholarship awarding criteria to meet our leveraging and marketing goals.

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# OEM Scholarship awarding index prior to fall 2008

OEM Recruitment Scholarships based on the Scholarship Index, Award Criteria and Amounts, Fall 2006 cohort



# OEM Scholarship parameters for 2008

Table 1: Standards for 2008 IU Excellence, IU Distinction, IU Prestige, and IU Recognition Scholarships.

Indiana Residents				
ACT	SAT	HIGH SCHOOL GPA		
		≥ 3.75	3.70 - 3.74	3.60 - 3.69
≥ 29	≥ 1300	IU Excellence \$8,000		
28	1250-1290	IU Prestige \$5,000		
25-27	1150-1240	IU Recognition \$2,000		
Non-Residents				
ACT	SAT	HIGH SCHOOL GPA		
		≥ 3.75	3.70 - 3.74	3.60 - 3.69
≥ 29	≥ 1300	IU Distinction \$8,000 Award		
28	1250-1290	IU Prestige \$5,000		
25-27	1150-1240	IU Recognition \$2,000		

# How are scholarships tracking for 2008 in comparison to 2007?

Table 1. Projected Enrollment from Automatic Scholarship Award Offers by Group.

		2007 Cohort 2/12/2007	2008 Cohort 2/13/2008	1 yr Δ, Merit and Need Awards	2007 Cohort Year END, Merit and Need Awards
Enrolled <sup>1</sup>	Under Represented Domestic Students	# 216	196	(20)	273
		\$ 401,318	\$874,819	\$473,501	\$558,318
	Other Domestic Students	# 2,789	2,669	(120)	4,059
		\$ 11,134,181	\$11,799,399	\$665,218	\$14,957,181
	International Students	# 97	88	(9)	159
		\$ 383,500	\$343,355	(\$40,145)	\$634,000
	TOTAL	# 3,102	2,953	(149)	4,491
		\$ 11,918,999	\$13,017,572	\$1,098,573	\$16,149,499

1. Actual Enrollment for 2007 Cohort, Projected for 2008 Cohort

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# *As we manage the enrollment at IU...*

We must keep quality of student body in mind.

We must keep diversity in mind.

We must keep international presence in mind.

We must keep affordability in mind.

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## Fall SAT Statistics, Beginner Cohorts

Cohort	25th	Mean	75th
	Percentile		Percentile
1997	990	1103	1220
1998	980	1102	1220
1999	980	1098	1210
2000	970	1097	1220
2001	980	1097	1210
2002	990	1100	1210
2003	990	1108	1220
2004	990	1103	1220
2005	990	1111	1230
2006	1000	1121	1240
2007	1030	1146	1260

## Fall cohort ethnic composition

Cohort	Minority Students <sup>1</sup>	African Americans
1997	563 9.2%	246 4.0%
1998	629 9.2%	277 4.1%
1999	634 9.6%	324 4.9%
2000	676 9.7%	299 4.3%
2001	647 9.5%	309 4.5%
2002	636 9.0%	262 3.7%
2003	667 9.8%	292 4.3%
2004	704 11.1%	354 5.6%
2005	814 11.7%	412 5.9%
2006	808 11.1%	343 4.7%
2007	818 11.4%	334 4.6%

<sup>1</sup>Includes African Americans, Asians, Latinos, and Native Americans

## Fall Cohort: International Students

Cohort	Nonresident Aliens	
2000	174	2.5%
2001	207	3.0%
2002	177	2.5%
2003	178	2.6%
2004	179	2.8%
2005	232	3.3%
2006	217	3.0%
2007	249	3.5%

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## Fall cohort residency

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Cohort	Indiana residents		Non-residents		Total
1997	4262	70%	1843	30%	6105
1998	4742	70%	2068	30%	6810
1999	4519	69%	2064	31%	6583
2000	4580	66%	2356	34%	6936
2001	4413	65%	2402	35%	6815
2002	4557	64%	2523	36%	7080
2003	4380	65%	2404	35%	6784
2004	4145	65%	2207	35%	6352
2005	4567	66%	2382	34%	6949
2006	4393	61%	2860	39%	7253
2007	4233	59%	2965	41%	7198

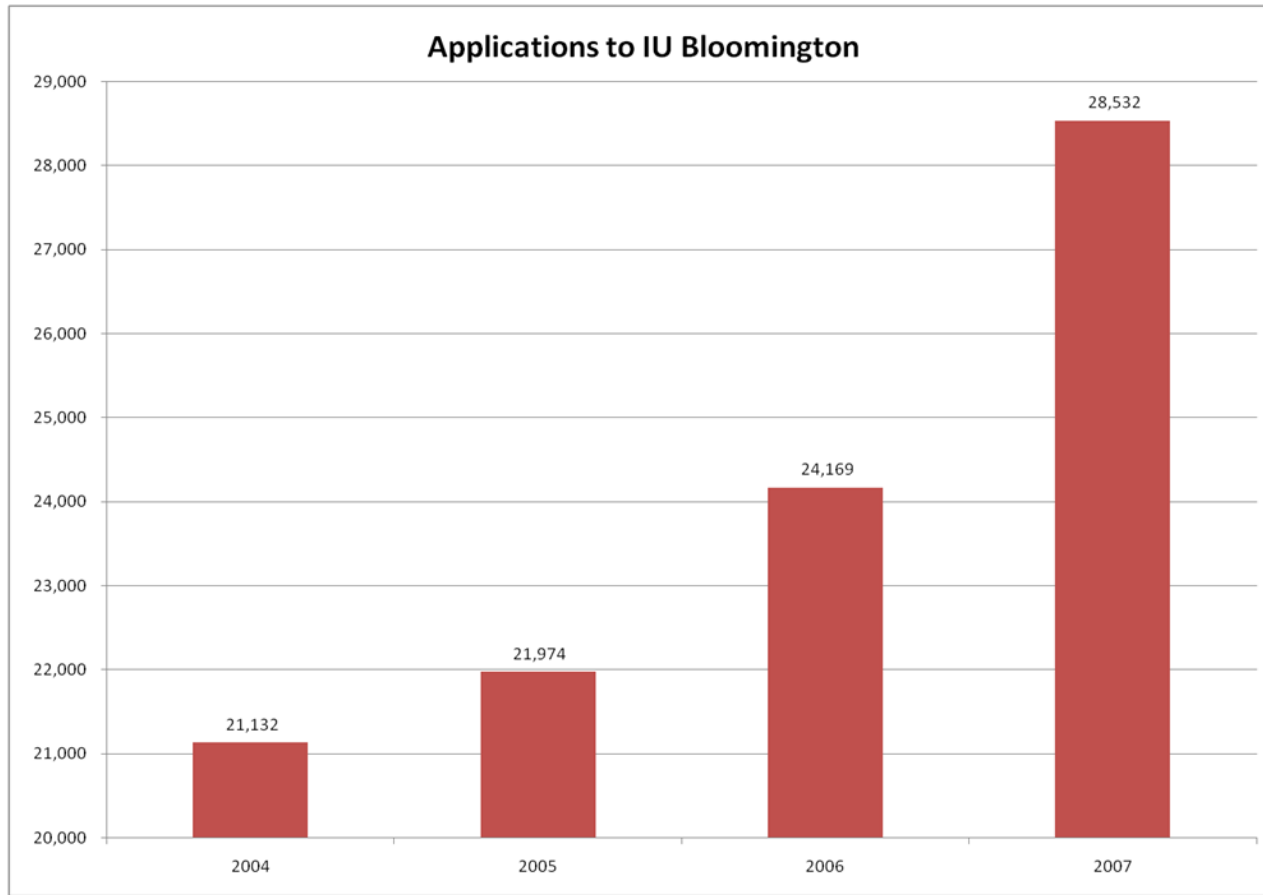
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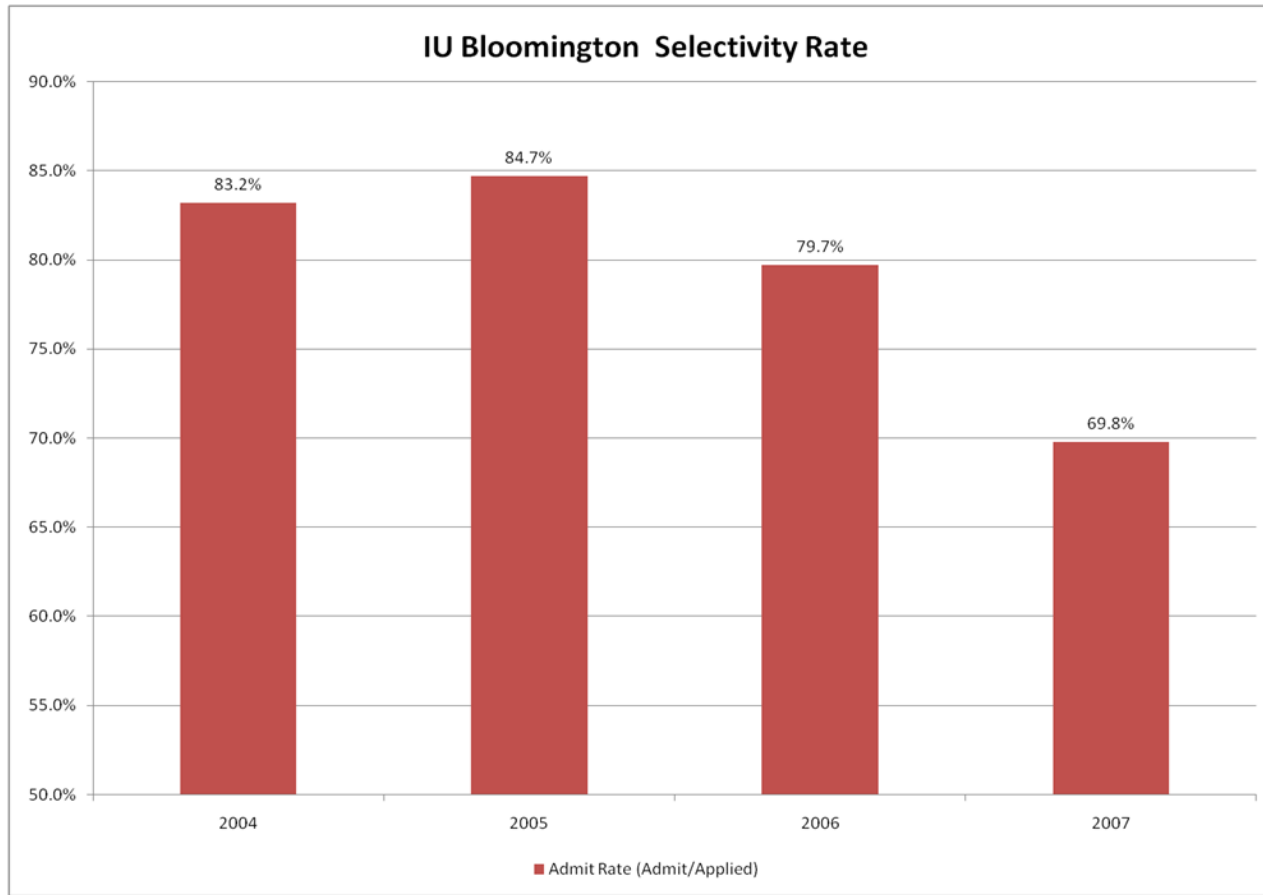
# Results

- We are meeting and exceeding expectations for our four recruitment goals.
  - Data mining and utilizing data is fundamental to our success.
  - Specific measures are moving in the right direction.
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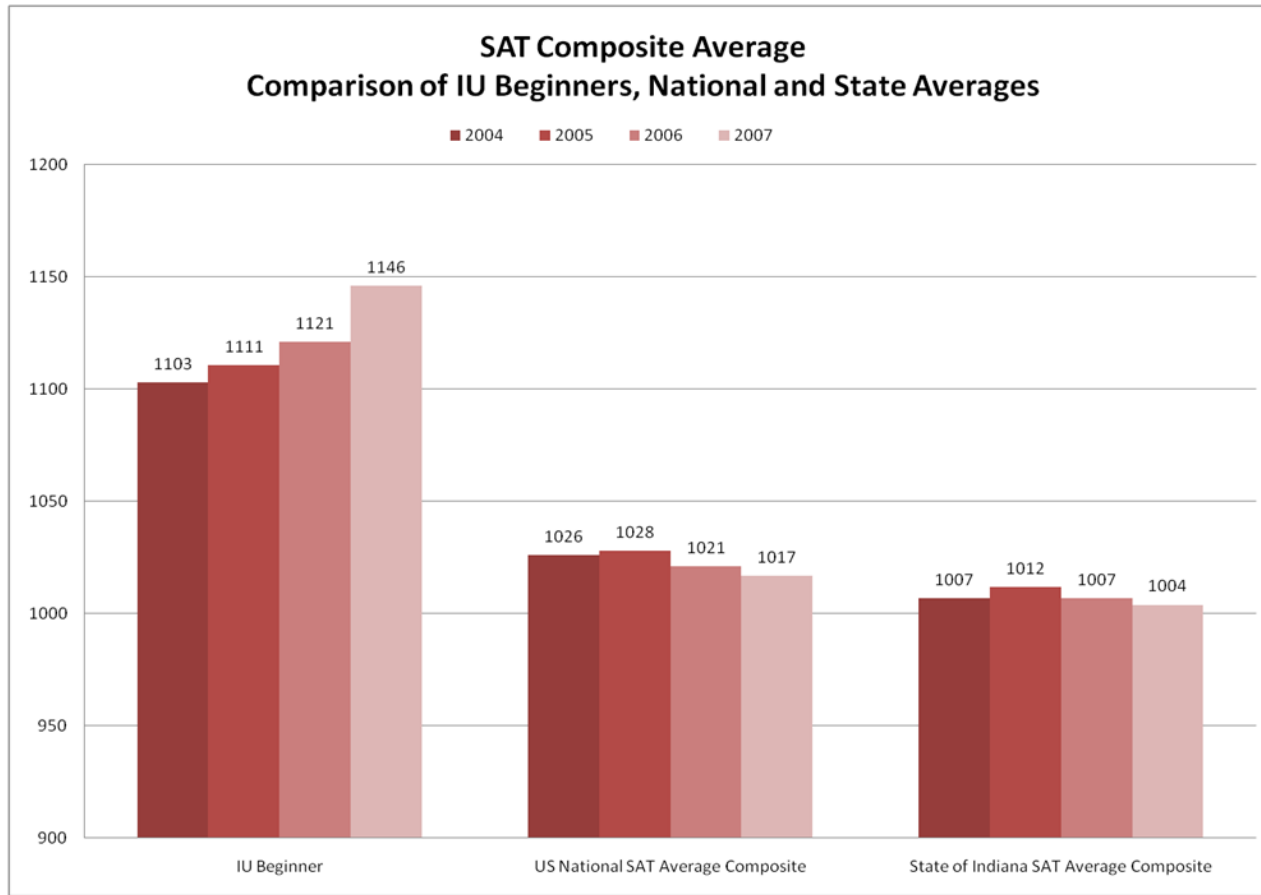
# Indiana University Bloomington



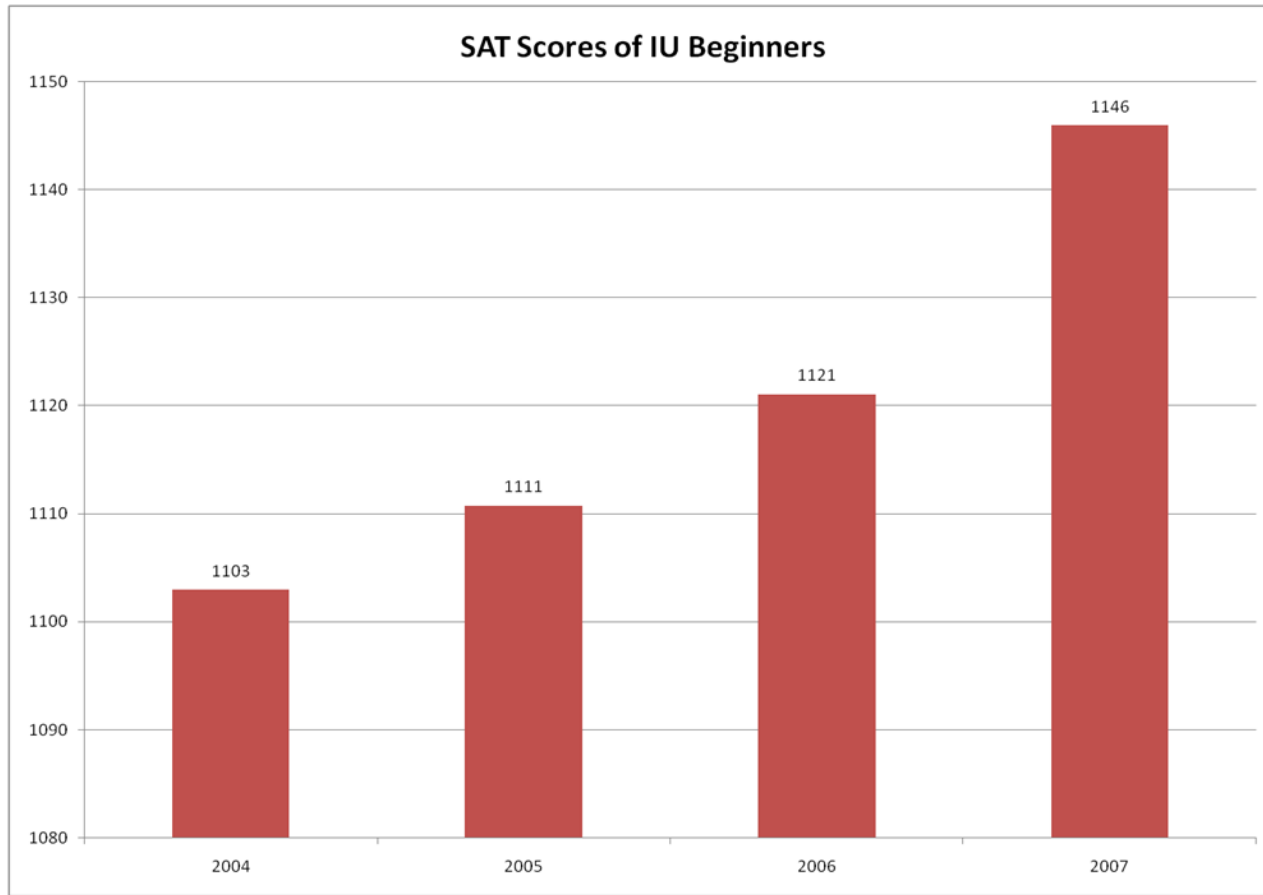
# Indiana University Bloomington



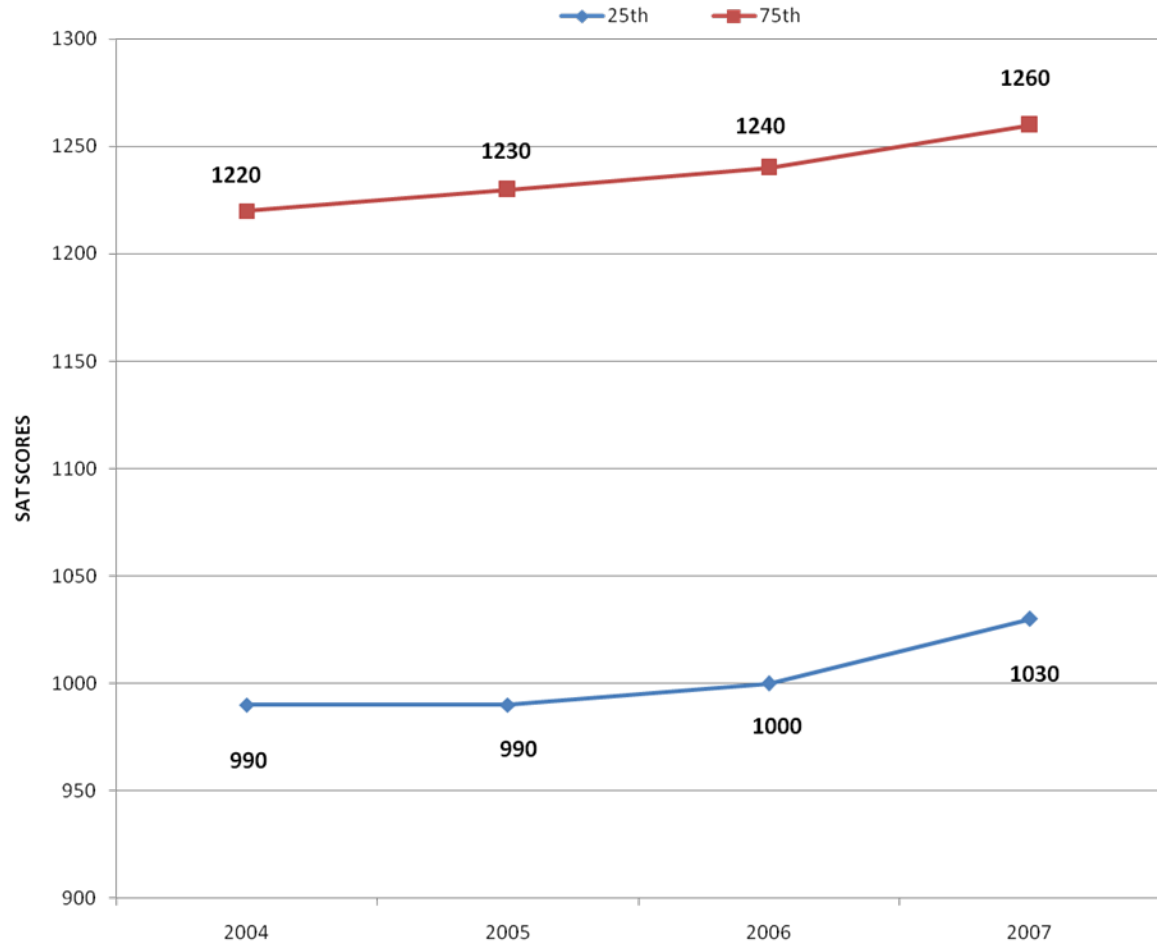
# Indiana University Bloomington



# Indiana University Bloomington



### SAT 25th and 75th Percentiles



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# Fall 2008 Admissions

- Admission standards have increased.
  - Most competitive admission process in Indiana University's history.
  - Application growth continued this year creating a two year increase of nearly 30% with over 30,000 applications received.
  - Quality brings quality, and our student quality profile will increase.
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# Fall 2008 Admissions

- Models Forecast:
    - FA 2008 class will be more academically talented than any prior freshmen class.
      - Mean SAT will increase.
      - 25<sup>th</sup> & 75<sup>th</sup> percentiles will increase.
    - Diversity will be strong.
      - Particularly among Hispanics.
    - International presence will be strong.
      - China, Japan, S. Korea and Taiwan
      - Largest growth, India
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# Fall 2008 Admissions

- We are well positioned to welcome the most academically talented freshmen class in the history of Indiana University.
  - Must convert admits to enrolled.
  - Must close the class.
  - Conversion is the key at this stage.

We must realize our potential with this freshmen class.

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# Summary

- Strategic Enrollment Management requires aligning recruitment and financial aid practices with enrollment goals and providing seamless service throughout the student lifecycle.
  - Our new direction for Enrollment Management addresses the primary goals of Indiana University.
  - Data in decision making is critical to achieving success and exceeding expectations.
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# Conclusion

- Decisions can be made using many different indicators, but there is no substitute for data, data mining and research.
  - We are determined to continually work to improve all aspects of our organization through constant assessment and evaluation.
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# Questions/Answers

## **Presenter**

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