Utilizing Strategic Enrollment Management to Shape Enrollment

2016 AACRAO
Monday, March 21, 2016
Session 4602
Phoenix, Arizona
Introductions
University of Oregon

- Jim Brooks
  - Assistant Vice President and Director of Financial Aid and Scholarships

- Jonathan Jacobs
  - Director of Enrollment Management Research

- Roger Thompson
  - Vice President for Enrollment Management
University of Oregon

- Public, Research Institution
- Member of the AAU
- Founded in 1876
- Located in Eugene, Oregon
- Enrollment: 24,300
- 90% Full Time students, and traditionally aged undergraduate population
- PAC–12 Conference member
Presentation Overview

- Strategic Enrollment Management Components
  - Philosophy and Principles
  - Recruitment Methodology
  - Financial Aid Strategy
  - Impact of Research/Modeling
  - Strategic Recruitment Reporting
  - Results
- Summary
- Questions and Answers
Strategic Enrollment Management focuses on service areas impacting student’s initial and continued enrollment.

Organizations which comprise the Division of Enrollment Management include:

- Admissions
- Financial Aid and Scholarships
- New Student Orientation and Visit Programs
- Registrar
- Research
- Strategic Communications
- Central Administration (HR, Budget etc)
UO Enrollment Management Organization Chart

Roger Thompson
Vice President

Jim Brooks
Assistant Vice President and Director of Financial Aid and Scholarships

Sue Eveland
Assistant Vice President and University Registrar

Jim Bouse
Director of EM Technology/Associate Registrar

Jim Rawlins
Assistant Vice President and Director of Admissions

Steve Robinson
Assistant Vice President and Chief of Staff

Cathy Hagerty
Executive Assistant (Interim)

Corr Bennett
Director of Orientation Programs

Holly Moline Simons
Director of Strategic Communications for Enrollment Management

Lynn Egli
Director of Budget, Finance and Administration

Jonathan Jacobs
Director of Research
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.
STUDENT LIFECYCLE

1. Prospective Student
2. Admitted to University of Oregon
3. Enrolled Student
4. Graduate of University of Oregon
5. University of Oregon Alumni
6. Donor to University of Oregon
Recruitment Methodology:

- It is everyone’s job to recruit and retain students
  - Be coordinated, strategic and targeted
  - Recognize competitive landscape
  - Develop aggressive, personalized recruitment
  - Out-work and out-think competition
  - Utilize research to guide decisions/strategy
  - “Win” mentality
  - Teamwork
Campus Visitors

Includes campus tours, duck preview, and duck days. Tour calendar is from July 1 to June 30.
Number of Public High School Graduates, 2008–2028: United States

- American Indian/Alaska Native
- Asian/Pacific Islander
- Black non-Hispanic
- Hispanic
- White Non-Hispanic

Source: WICHE Knocking at the College Door Projections of High School Graduates
Four Primary Recruitment Goals

• Improve **quality** of freshman class as defined by GPA & standardized test scores

• Increase **diversity** of freshman class as defined by ethnicity & social economic status

• Increase **international** presence of the University of Oregon

• Keep UO **affordable**
Financial Aid Strategy

- Need–Based Financial Aid
- Merit–Based Financial Aid

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

- Must be based on high standards
- Designed to increase quality at all levels in “pipeline” or “funnel”
- Requires continual outcome assessment

Key Recruitment Point:
- Parents, students, high school contacts should have clear understanding of merit-based parameters early in student selection process
Financial Aid Perspective

$250,000,000 in Financial Aid UO students and their parents are receiving in the 2015–16 academic year...

- Roughly equal to the GDP of the Portuguese speaking island of Sao Tome and Principe in the Gulf of Guinea

- Approximately 2 times the amount of the current NFL salary cap of $133 million per team
Financial Aid Currently: Snapshot

- Award $250,000,000 in financial aid
- 73% of undergraduates receive aid
- 25% of admitted undergraduates are Federal Pell Grant eligible, 38% Oregonian
- 59% of graduating class received institutional aid
- 51% of graduating class have student debt
Our Premier Need-Based Financial Aid Programs

- PathwayOregon
  - Redesigned to meet enrollment goals
  - Clear, concise criteria
  - Increase in students and dollars awarded
  - Designed for Oregon Residents
Financial Aid: New Initiative
Pathway Oregon

- Redesigned to meet Enrollment Goals:
  - Need–based program
    - Addresses need of lowest income Oregon families
    - Builds on existing federal program (Pell)
    - Provides full cost of tuition & fees to participants
    - Begins recruitment process at the early high school level
    - Delivers message of “hope” to low income population
    - Builds on mentoring structure for success already in place
    - Provides funding for diverse group of students
Eligibility Criteria

- Must be an Oregon Resident
- Must graduate from an Oregon HS with a HS GPA of 3.4 or higher
- Must be Pell Grant eligible
- Must apply to University of Oregon by January 15th
Desired Outcomes

- Need-Based Aid:
  - Easy to understand, clear eligibility criteria
  - Increase SES diversity
  - Increase retention
  - Increase graduation rates
  - Shorten time to graduation
PathwayOregon Freshman Enrollment

<table>
<thead>
<tr>
<th>Year</th>
<th>Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2011</td>
<td>450</td>
</tr>
<tr>
<td>Fall 2012</td>
<td>395</td>
</tr>
<tr>
<td>Fall 2013</td>
<td>523</td>
</tr>
<tr>
<td>Fall 2014</td>
<td>542</td>
</tr>
<tr>
<td>Fall 2015</td>
<td>703</td>
</tr>
</tbody>
</table>

Program restructured

UO Office of Enrollment Management, November 4, 2015
PathwayOregon Awards to Freshmen

Awarded aid and not actual disbursements.
UO Office of Enrollment Management, February 25, 2016
Why Strategically Restructure the Scholarship Program?

- Scholarship programs were not new
- Effectiveness never assessed
- Transparency
- Concerns about affordability
  - Low income, middle income
- Balance need–based and merit–based aid
- Increase resident student yield
- Concerns about student debt load
Desired Outcomes

- Merit-Based Aid:
  - Easy to understand, clear eligibility criteria
  - High standards
  - Increase quality
  - Increase retention
  - Increase graduation rates
  - Shorten time to graduation
Summit & Apex Criteria

- **Summit Scholarship:**
  - $6,000 residents / $9,000 non-residents
  - Requires 3.80 GPA, 1190 SAT/ 26 ACT

- **Apex Scholarship:**
  - $3,000 residents / $4,000 non-residents
  - Requires 3.60 GPA, 1150 SAT/ 25 ACT

January 15 application deadline
Aligning Financial Aid Strategy with New Enrollment Goals

<table>
<thead>
<tr>
<th>PathwayOregon</th>
<th>Need</th>
<th>Merit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Diversity Excellence</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>UO Summit</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>UO Apex</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>UO Presidential</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

**OTHER AID**

- Stamps Leadership Scholarship (partnership between Stamps Family Trust & UO)
- $2,000,000,000 fundraising campaign announced with significant need & merit-based aid goals established
Research Priorities – The Impact of Aid

1. What effect does additional merit aid have on the probability of enrollment?

2. How do we model the effect of restructured aid on an entering class?

3. How can we compare different aid packages dynamically and instantly?
1. Effect of Aid

Institution Aid (an independent variable) influences the decision to attend college (the target variable).

- Population: Freshman Admits, fall 2011
- Logistic Regression: Did the student enroll (Yes or No)

Control for:
- Amount of institutional aid
- Residency
- SAT or converted ACT
- High School GPA
- Race/Ethnicity groupings
- Application timing
- Admission to honor’s college
- First Generation
- Significant interactions

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Max–Rescaled R–square</td>
<td>.25</td>
</tr>
<tr>
<td>C–statistic</td>
<td>.77</td>
</tr>
<tr>
<td>Hosmer and Lemeshow Goodness–of–Fit Test</td>
<td>.57</td>
</tr>
</tbody>
</table>
2. Model the Effect of Restructured Aid

The model gives a probability based on the metrics. Changing a metric changes the probability of enrollment.

High School GPA
SAT or converted ACT
Admission to Honor’s College
Residency
Day application was submitted
First generation
Underrepresented race/ethnicity

TOTAL GRANT AID (minus federal/state)

<table>
<thead>
<tr>
<th>Orig</th>
<th>$0</th>
<th>$1K</th>
<th>$2K</th>
<th>$3K</th>
<th>$4K</th>
<th>$5K</th>
<th>$6K</th>
<th>$7K</th>
<th>$8K</th>
<th>$9K</th>
<th>$10K</th>
<th>$11K</th>
<th>$12K</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.0%</td>
<td>17.3%</td>
<td>19.4%</td>
<td>22.0%</td>
<td>25.1%</td>
<td>28.8%</td>
<td>33.0%</td>
<td>37.5%</td>
<td>42.1%</td>
<td>46.7%</td>
<td>51.0%</td>
<td>54.9%</td>
<td>58.6%</td>
<td>62.2%</td>
</tr>
</tbody>
</table>
### 3. Compare Aid Packages Instantly

#### Simplified Aid Simulator

<table>
<thead>
<tr>
<th>Population</th>
<th>GPA and Test Score Cuts</th>
<th>Proposed Award</th>
<th>Admits</th>
<th>Yield (original)</th>
<th>Yield (predicted)</th>
<th>Budget (original)</th>
<th>Budget (predicted)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident High GPA/Test</td>
<td>3.80</td>
<td>1190</td>
<td>$6,000</td>
<td>1,500</td>
<td>750</td>
<td>900</td>
<td>$3.0M</td>
</tr>
<tr>
<td>Resident Medium GPA/Test</td>
<td>3.60</td>
<td>1150</td>
<td>$3,000</td>
<td>1,000</td>
<td>500</td>
<td>600</td>
<td>$1.0M</td>
</tr>
<tr>
<td>Resident Low GPA/TEST</td>
<td>$0</td>
<td></td>
<td>2,000</td>
<td>1,000</td>
<td>900</td>
<td></td>
<td>$2.0M</td>
</tr>
<tr>
<td>Resident TOTAL</td>
<td></td>
<td></td>
<td>4,500</td>
<td>2,250</td>
<td>2,400</td>
<td></td>
<td>$6.0M</td>
</tr>
</tbody>
</table>

- **Customize who gets aid and how much**
- **Admits fall into the right bucket based on GPA/Test cuts**
- **The model calculates the new yield based on the proposed award**
- **Verify that the program fits budget requirements**

Dummy data
# Identify Elasticity of Demand

## Probability of Enrollment at Different Levels of Aid

Residents, 3.8 HSGPA or higher, 1200 SAT or higher

- **3.3 point increase to yield.**
  - 10% persuaded by aid
  - 90% already coming

- **10.5 point increase to yield.**
  - 30% persuaded by aid
  - 70% already coming

### Table Summary

<table>
<thead>
<tr>
<th>Aid</th>
<th>Admit</th>
<th>Total Enroll</th>
<th>Cost</th>
<th>Cost Per Gained Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>100</td>
<td>34</td>
<td>$0</td>
<td>NA</td>
</tr>
<tr>
<td>$2,000</td>
<td>100</td>
<td>37 (+3)</td>
<td>$74K</td>
<td>$25K</td>
</tr>
<tr>
<td>$5,000</td>
<td>100</td>
<td>44 (+10)</td>
<td>$220K</td>
<td>$22K</td>
</tr>
</tbody>
</table>
Strategic Recruitment Reporting

Admissions Cycle

- Point-in-time data
- Weekly recruitment reports
- Weekly enrollment projections
### Strategic Reporting: Point-in-Time Data

**GOAL =** Valid data for comparing where you are this year to where you were at the same time last year.

<table>
<thead>
<tr>
<th>CURRENT DATA MAR 21 2016</th>
<th>DATA AS OF MAR 21 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Resident admit</strong></td>
<td><strong>Nonresident admit</strong></td>
</tr>
<tr>
<td>3.59 high school GPA</td>
<td>3.62 high school GPA</td>
</tr>
<tr>
<td>FAFSA filed = yes</td>
<td>FAFSA filed = no</td>
</tr>
<tr>
<td>Campus tour = yes</td>
<td>Campus tour = yes</td>
</tr>
<tr>
<td>Facebook app = yes</td>
<td>Facebook app = no</td>
</tr>
</tbody>
</table>

**Luis**
- fall 2015 start

**Sarah**
- fall 2016 start
Strategic Reporting: Point-in-Time Data

Luis
fall 2015 start

Oct 2014
Chef tour
Applied (self report HSGPA)
Official test scores
Admitted
Joined Facebook app
Deposit
Final high school GPA
Filed the FAFSA
Residency affidavit approved

Fall 2015

Sarah
fall 2016 start

Oct 2015
Applied
Official test scores
Admitted

Jan 2016

May 2016
The unknown future!

Fall 2016
Important Point-in-Time Data

- Date of Application
- Date of Admission
- Date of Deposit/Confirmation
- Date FAFSA was filed
- Date SAT/ACT data received
- Date applied for housing *(if the process is the same)*
- Important Events *(e.g. Tour, Reception, Facebook group)*

- Residency *(for public universities)*
- High School GPA
- Major

The goal is to have all data that might change and is related to either:
(1) probability of enrollment,
(2) strategic decision making.
## Point-in-Time Reporting

LOW HANGING FRUIT: Descriptive Reports

<table>
<thead>
<tr>
<th></th>
<th>Fall 2014 Point-in-Time</th>
<th>Fall 2015 Point-in-Time</th>
<th>Fall 2016 Today</th>
<th>Fall 2014 Final</th>
<th>Fall 2015 Final</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicants</td>
<td>9,000</td>
<td>10,000</td>
<td>9,500</td>
<td>20,000</td>
<td>21,000</td>
</tr>
<tr>
<td>Pending</td>
<td>5,000</td>
<td>5,500</td>
<td>4,000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Denied</td>
<td>1,000</td>
<td>800</td>
<td>500</td>
<td>8,000</td>
<td>9,500</td>
</tr>
<tr>
<td>Admitted</td>
<td>3,000</td>
<td>3,500</td>
<td>5,000</td>
<td>12,000</td>
<td>11,500</td>
</tr>
<tr>
<td>Deposit</td>
<td>100</td>
<td>150</td>
<td>250</td>
<td>2,700</td>
<td>2,800</td>
</tr>
</tbody>
</table>

Dive into exactly what the application funnel looked like at the same point in time last year (residency, test scores, event attendance, etc).
Point-in-Time Predictions

MORE COMPLEX: Predicting Probability of Yield per Student

- Logistic Regression (Probability of Enrollment)
  - Control for:
    - Residency (at PIT)
    - Application Category (e.g. Admit, Declined, Deposit, Registered) (at PIT)
    - Admitted within the last two weeks (at PIT)
    - Attended specific event correlated with enrollment (at PIT)
    - Filed the FAFSA (at PIT)
    - SAT or converted ACT (at PIT)
    - High School GPA (final OK, but PIT preferred)
    - Gender (final OK)
    - Race/Ethnicity groupings (final OK)

Luis
Point-in-time score: 35%
Enrolled: Yes

Sarah
Point-in-time score: 30%
Enrolled: ??
## Point-in-Time Enrollment Projections

### MORE COMPLEX: Predicting Fall Yield and Enrollment

<table>
<thead>
<tr>
<th>Student Category at Point in Time</th>
<th>Resident</th>
<th></th>
<th></th>
<th>Total</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In pipe</td>
<td>Projected Enrolled</td>
<td>In pipe</td>
<td>Projected Enrolled</td>
<td>In pipe</td>
<td>Projected Enrolled</td>
</tr>
<tr>
<td>Deposits</td>
<td>150</td>
<td>140</td>
<td>100</td>
<td>80</td>
<td>250</td>
<td>220</td>
</tr>
<tr>
<td>Admits</td>
<td>1,250</td>
<td>700</td>
<td>3,500</td>
<td>1,000</td>
<td>4,750</td>
<td>1,700</td>
</tr>
<tr>
<td>Pending</td>
<td>1,000</td>
<td>200</td>
<td>3,000</td>
<td>250</td>
<td>4,000</td>
<td>450</td>
</tr>
<tr>
<td>Future Expected</td>
<td>0</td>
<td>60</td>
<td>0</td>
<td>70</td>
<td>0</td>
<td>130</td>
</tr>
<tr>
<td>TOTAL</td>
<td>2,400</td>
<td>1,100</td>
<td>6,600</td>
<td>1,400</td>
<td>9,000</td>
<td>2,500</td>
</tr>
<tr>
<td>LAST YEAR</td>
<td>2,500</td>
<td>1,130</td>
<td>6,700</td>
<td>1,420</td>
<td>9,200</td>
<td>2,550</td>
</tr>
</tbody>
</table>

These projections can be run daily as the pipeline changes, apps turn to admits, and admits turn to deposits.
Percentage of Students who are Domestic Minority Entering Freshmen

- Fall 2010: 22%
- Fall 2011: 23%
- Fall 2012: 25%
- Fall 2013: 27%
- Fall 2014: 27%
- Fall 2015: 28%

UO Office of Enrollment Management, November 30, 2015
Average High School GPA
Entering Freshmen, Fall 2010 to Fall 2015

- 2010: 3.52
- 2011: 3.59
- 2012: 3.57
- 2013: 3.60
- 2014: 3.58
- 2015: 3.61

UO Office of Enrollment Management, November 30, 2015
Net Cost of Attendance
New Residents who Receive Aid, Fall 2009 to Fall 2014

In fall 2013 additional need and merit aid were targeted to resident students.
Source: University of Oregon IPEDS submission – net price
UO Office of Enrollment Management, November 30, 2015
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 the UO.

It is everyone’s job to recruit and retain students.

 Requires outstanding team members
To be successful in reshaping an entering class, you must align financial aid with recruitment goals.

At the University of Oregon, our need–based & merit–based institutional financial aid is designed to support recruitment goals and leverage resources for maximum effectiveness.
Questions/Answers

Contact Information for University of Oregon Presenters:

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