



*Revised Implementation Plan*

# **Develop a Data-Driven Enrollment Program to Increase Enrollment through Improved Recruitment and Retention Initiatives**

**Noel-Levitz®**

Prepared by Gary Fretwell, February 3, 2010



## Contents

<b>Executive Summary .....</b>	<b>1</b>
<b>Detailed Implementation Plan .....</b>	<b>3</b>
<b>Northeastern State University’s Return on Investment.....</b>	<b>21</b>
<b>Northeastern State University’s Investment.....</b>	<b>23</b>
<b>Project Timeline.....</b>	<b>30</b>
<b>Next Steps and References .....</b>	<b>31</b>
<b>The Noel-Levitz Promise to Northeastern State University .....</b>	<b>36</b>



## Executive Summary

I truly enjoyed my visit to Northeastern State University (NSU) on December 10-11, 2009 as well as our subsequent conversations. I benefited from your extensive preparation in advance of my visit and from everyone's full and enthusiastic participation in the interviews and meetings. I was especially impressed with the university's capable and dedicated staff. It is evident that the team is committed to the institution, your mission, and to ensuring that you reach your full financial and enrollment potential. In addition, I felt that you were at a pivotal point in the University's history. Your strong senior leadership, a bold vision, and the willingness to change and adopt new processes and systems is impressive.

During my visit, we discussed your intent to increase enrollment, improve retention, and improve academic success of students. Specific goals include:

- Increase transfer students by 10-11 percent;
- Increase first time freshmen by 2.5 percent;
- Increase share of college bound students in Tulsa County;
- Have a minimum of 87 percent first to second semester retention rate;
- Have a minimum of 70 percent first to second year semester retention rate;
- Have a maximum 18 percent below 2.0 GPA at the end of the first semester;
- Have a maximum of 18 percent below 2.0 GPA at the end of the first year;
- Have less than 12 percent academically suspended after the first year; and
- Increase completion rate of the current cohort by seven percent.

After spending time with your staff, analyzing your current data and processes, and reflecting on your institutional strengths, I am confident that NSU can expedite the achievement of these goals through the development of a well-defined enrollment management program. I have given your goals a great deal of thought and believe that our partnership can actually achieve and exceed your enrollment goals for the future. We would welcome the opportunity to build on your recent successes and partner with your team for long-term success. Specifically, I recommend integrating the following strategies into your enrollment operations:

### **PHASE I: Implement immediate strategies and plans to shape your recruitment and retention efforts for 2010 and beyond**

- I. Develop an annual marketing and recruitment plan to drive your new student enrollment program**
- II. Develop a strategic plan to use financial aid and scholarships to support the achievement of recruitment and retention goals**



- III. Strengthen your admissions Web site content to create an inviting and persuasive experience for students**
- IV. Develop a comprehensive retention program that engages the campus community**
  - i) Gather fresh data to determine student satisfaction**
  - ii) Implement a systematic, data-driven approach to student success by identifying at-risk students and intervening early**
  - iii) Improve the academic advising process to ensure students receive the highest level of services available**
  - iv) Improve quality service on campus and teamwork among staff**

**PHASE II: Execute strategic long-term plans and tools to ensure future success**

- V. Create a strategic enrollment plan to guide longer-term goal setting and achievement efforts**
- VI. Refine and implement strong annual recruitment plans that help build toward long term enrollment goals**
- VII. Maximize the effectiveness of financial aid awards with strategic financial aid research and consulting support**
- VIII. Incorporate predictive modeling to qualify and grade your inquiry pool early and often**

Incorporating these strategies into your current efforts will strengthen your existing program and provide a foundation from which to achieve your enrollment goals. To help you with this, I have developed the following Implementation Plan. This plan, as promised, is comprehensive, extensive, and defines a long-term partnership. According to my preliminary calculations, **successfully implementing these strategies will potentially result in a \$4,857,896 Return on Investment (ROI).**

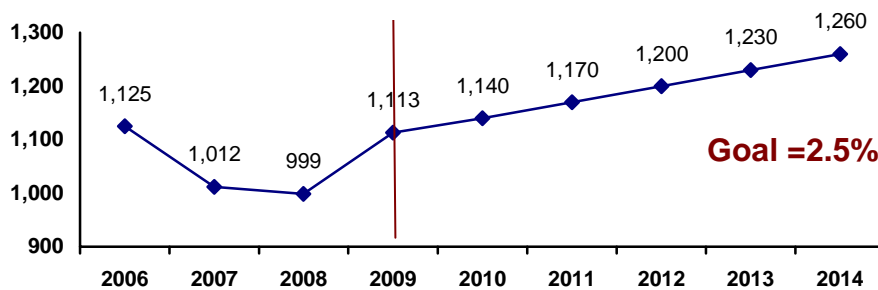
I will call you the week of February 8 to discuss my recommendations with you. We are committed to being strong partners with you throughout the project. If you have questions prior to our phone call, please feel free to contact me at 1-800-876-1117, or e-mail [gary-fretwell@noellevitz.com](mailto:gary-fretwell@noellevitz.com).

## Detailed Implementation Plan

### PHASE I: Implement immediate strategies and plans to shape your recruitment and retention efforts for 2010 and beyond

During my visit, we discussed the need for you to implement immediate tactical strategies that put the plans and processes in place to begin progress toward your enrollment goals. This plan will build on the excellent market research you have just recently completed and ensure the successful integration of these findings into your enrollment initiatives. Given your dramatic goals for the future, getting the project off to a strong start to will allow you to impact enrollment in 2010 and set the stage for a more efficient and effective enrollment program in future years.

*Northeastern State University's Freshmen Enrollment Goals*



We will begin our partnership with the development of an annual recruitment plan and annual retention plan coupled with a review of your financial aid processes. It is important that admissions, financial aid, and student services are working closely together to have the greatest impact on student enrollment. Another component that will be vital for NSU's enrollment program is to ensure that your Web site is serving the students and your needs effectively. This is a key recruitment tool that helps make or break goal attainment.

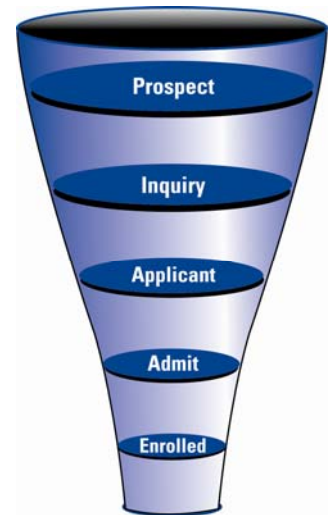
By beginning the partnership with a focus on the immediate tactical plans, you will ensure that the essential foundation necessary to achieve your enrollment goals is set in place. To help you accomplish this, I have developed this project in two phases. First, we will focus on the tactical strategies necessary to bring in the class of 2010 and 2011. After ensuring the pieces are in place for immediate success, we will turn our focus to Phase II, which will add more long-term strategic enrollment planning to your processes to ensure that the immediate plans are not only serving your immediate enrollment needs but are moving toward your long-term goals.

## Develop an annual marketing and recruitment plan to drive your new student enrollment program

During my visit, we discussed the need for NSU to collect and utilize data more strategically throughout the recruitment cycle. There is a strong opportunity for you to more systematically collect and track inquiries and effectively follow through with students as they progress through your funnel. Without sound data, it is difficult to develop effective funnel management techniques to positively impact and drive your new student enrollment. Instead, students who do not self-select to enroll are lost without adequate intervention by NSU.

Based on the first-year student data you do have available, you are currently converting inquiry to applicants at 44.6 percent (compared to the national average of 38 percent for public four-year institutions). Further, you are converting applicants to admitted students at 71.5 (compared to the national average of 71 percent for public four-year institutions). In order to achieve your goal of increasing new student enrollment, you need to take immediate action to better fill, manage, and track your recruitment funnel from prospect to enroll. Your strong conversion and yield rates are an indication that you do not have an inquiry pool of sufficient size to reach your enrollment goals.

To help fill the funnel with students likely to enroll at NSU, we will implement predictive modeling at the name buy stage. This will allow you to build a stronger funnel to help reach your enrollment goals. In collaboration with the National Research Center for College and University Admissions (NRCCUA), we will assist you with implementing predictive modeling to identify students who are “good fits” for NSU and have a high probability of enrolling *before* you purchase their names. Specifically, we will use historical data (name, address, and date of birth) from your recent entering classes and all of the NRCCUA data elements to build a customized predictive model. We will use this model to search the NRCCUA database to identify prospective students who are the best fit for NSU.



Implementing this strategy enables you to:

- Meticulously mine NRCCUA’s database of five million high school names—the largest and richest database of its kind—before you purchase student search lists;
- Streamline your list purchases by pinpointing the enrollment probability of each student lead from NRCCUA;
- Segment your search strategies and lists by enrollment probability, along with factors such as academic ability, geographic location, major, and more; and
- Branch into new markets easily and uncover new groups of high quality student leads.

Data is only as good as how you plan to use it. To position NSU to grow enrollment, you must have a comprehensive annual recruitment plan. An annual plan serves a critical function in the



day-to-day tasks and activities of an admissions office. Specifically, it outlines immediate and short-term goals and contains supporting strategies and tactics to achieve these goals.

To assist you with developing this plan, we will provide 12 consulting visits over 12 months. Throughout this process, we will focus on developing strategies to attract and recruit students who are a good fit for NSU. Additionally, we will focus on providing appropriate training for your entire admissions team.

To develop the annual recruitment plan, we will work with appropriate team members to ensure that the plan serves as a communication tool that describes what NSU wants to achieve and how you will accomplish it. This plan will benefit NSU by:

- Providing a systematic assessment of strengths, weaknesses, opportunities, and threats, along with current marketing and recruiting strategies;
- Establishing mutually agreed upon institutional goals and priorities;
- Encouraging innovative thinking and problem solving;
- Creating awareness of obstacles that may need to be overcome;
- Coordinating and unifying staff effort;
- Ensuring more effective use of existing resources and identifying the possible need for additional resources;
- Assigning responsibility and accountability, and scheduling work;
- Facilitating control and evaluation of activities;
- Communicating and documenting the new student enrollment “game plan”; and
- Providing a basis for future planning.

#### *Training to meet goals and objectives*

As I mentioned previously, we will also provide NSU’s admissions team with the training and skills required to implement a sophisticated new student enrollment process. We will provide specific opportunities that focus on enrollment management essential over the course of the project.

#### **Develop a strategic plan to use financial aid and scholarships to support the achievement of recruitment and retention goals**

The most successful enrollment management programs include effective financial aid programs designed to help families overcome affordability issues associated with a college education. These successful institutions also have:

1. A competitive scholarship and financial aid program designed to enroll the desired number and types of students, control the discount rate, and optimize net revenue.
2. A strong working relationship between the admissions and financial aid office. Any breakdown in communication between the admissions office, financial aid office, and student/parent(s) will generally undermine an institution's ability to meet their new and returning student enrollment goals.

During my visit, we discussed the need for you to establish more strategic strategies and processes to better address the needs of NSU. This includes more effectively collecting, analyzing, and using data to make your financial aid and scholarship decisions. To assist you in strengthening the financial aid program at NSU, we will provide six months of financial aid consulting, which includes four on-site visits.

We will begin our partnership with an assessment of your current financial aid policies and procedures. Specifically, we will review the operations of your financial aid office—financial aid policy issues, office operations and development, the level of cooperation with the admissions office, enrollment management planning, and internal public relations.

Through these consultations we will:

- Gauge the impact of your financial aid on student recruitment and retention;
- Assess the capabilities of your financial aid personnel, including their handling of awarding, counseling, and customer service;
- Evaluate the perceptions current students, faculty, and other staff have about financial aid;
- Assess your communications with financial aid applicants, currently enrolled students, and families of both groups;
- Review financial aid procedures and policies including external (federal and state) reporting processes;
- Evaluate your data processing capabilities; and
- Examine how other institutional policies directly impact financial aid.

This partnership will ensure that all critical areas of financial aid are addressed and assessed on a regular basis.

### **Strengthen your admissions Web site content to create an inviting and persuasive experience for students**

Today's students are technologically savvy. It is important to ensure that your site is keeping pace with the rapidly evolving expectations of students who visit it. Effective and engaging copy on your site is essential, but is often the hardest part of your Web presence to create.



The e-expectations of prospective students are on the rise. Online applications, virtual tours, site personalization, and social media opportunities are just a few of the new standards in Web site best practices for colleges and universities. These are the elements prospective students are looking for when visiting your Web site. A 2009 Noel-Levitz study revealed that 88 percent of prospective students will leave a site if it fails to meet their expectations. With more and more students “secret shopping” and conducting their college-search online, your Web site is often the only interface students have with NSU before they make their decision to apply.

To develop or strengthen your Web site, e-communications, and online recruitment marketing strategies, we will conduct a Web opportunities analysis. This analysis compares your e-communications program, site design, navigation, content, and functionality with best practices for similar institutions in the context of recruitment marketing.

To strengthen your site content, we will provide strategic and tactical support in the creation of text to create a compelling view of NSU and move users further into the site and on to complete inquiry, visit request forms, and applications. Our approach provides you with research on your primary markets, revealing content priorities and preferences as well as the text resources to revitalize your Web pages.

As a result of the analysis, you will learn what you can do to optimize your Web site and e-communications program to aid in the recruitment of new students and with communications to decision influencers. Specifically, this analysis provides:

- A review of your current Web site and social media practices;
- A competition review of up to 8 of your main competitor’s Web sites and major social media resources;
- An online survey or online usability test for one market;
- The creation of a Web and Social Media strategy document;
- Interviews with your team regarding current navigation structure of your Web site; and
- An on-campus presentation of findings and recommendations.

At the conclusion of the e-communications and Web analysis you will have a road map and priorities for site redevelopment activities to support recruitment and recommendations for an e-communications plan. We will provide you with a Web and Social Media strategy document that outlines recommendations for improving your strategy. As you clarify next steps, we will be available to provide further research, creative support, and strategic consulting services that you may deem necessary. During the assessment, we will determine what Web pages need to be addressed during the project. Then we will develop content resources to meet the needs of your key markets while effectively positioning NSU’s distinctive benefits. We will work with the Web team to assess navigation systems and select pages for redevelopment and create up to 30 new pages of original text, edit an additional 20 pages for the site and create a Search Engine Optimization Strategy Blueprint developed for each page assignment.

## **Develop a comprehensive retention program that engages the campus community**

Based on your current first- to second-year retention rate of 63.58 percent, (national average is 70.5 percent for public four-year institutions) and your four/five/six-year graduation rate of 24.5 percent (national average is 37.8 percent for public four-year institutions), there is ample opportunity to increase your overall retention effectiveness.

To accomplish this, you need to round out your enrollment efforts by developing a strong retention plan with supporting tools and training. Developing a strong program for quality student life and learning will allow NSU to ensure that students have a positive experience while attending. This has a ripple effect by helping you to retain more students, build a stronger presence in the marketplace by increases in student satisfaction and positive word-of-mouth, and increasing loyalty of alumni.

I am confident that with the right plans and supporting strategies, you can significantly increase your retention and graduation rates to meet your retention goals of a minimum of 70 percent first to second year retention rate and an increase in the completion rate of the current cohort by seven percent.

To effectively boost both your retention and graduation rates, it is imperative that you create an action-oriented retention program that clearly outlines your annual and long-term retention goals, strategies, and tactics, as well as engages the entire campus community in the implementation effort.

To assist you in developing such a retention program at NSU we will provide six months of retention consulting support, including three on-site consultations. During our time on campus we will follow a four-step process that will enable you to create a functional retention program. These steps are assessment, planning, tools, and implementation. Following these steps will allow you to:

- Identify measurable goals for retention of specific populations;
- Prioritize strategies to achieve those goals;
- Articulate action plans—tasks, timelines, responsibilities—to ensure implementation of the strategies;
- Identify assessment measures for effectiveness of the strategies;
- Assist in engaging everyone in the retention initiative by working with the entire campus community; and
- Develop a process that ensures progress.

I have outlined each of these steps in detail below.

## Step One: Assessment

We will begin the assessment phase by conducting student satisfaction research. The results from this research will be instrumental in focusing the retention planning effort on the most relevant issues.

Specifically, we will use this information to:

- Determine how current students are perceiving their experience at NSU;
- Identify where to focus attention first to get retention results, looking across the campus at diverse areas ranging from instruction and academic support to student services, campus safety, and overall campus climate;
- Conduct comparisons between national benchmark data and your data; and
- Provide benchmark baseline data to guide this and future retention initiatives and assessments. (I recommend re-surveying at least every other year.)

Following the administration of these assessments, we will conduct on-site retention consulting visits. Time will be devoted to:

- Analyzing institutional goals in conjunction with the current retention state, including the retention structure at NSU and relevant reporting relationships;
- Analyzing the retention funnel, non-persisters profile, and reviewing funnel reports;
- Conducting on-site interviews and focus groups to better understand the retention culture at NSU;
- Meeting with senior staff, faculty, students, and deans to discuss and create a retention committee; and
- Conducting a retention summit to the campus community to explain our approach to retention planning, review the results of the student satisfaction research, and outline key strategies and recommendations that will help NSU take full advantage of your retention opportunities.

*Implement a systematic, data-driven approach to student success by identifying at-risk students and intervening early*

In a successful retention program it is essential that students who have the greatest need for support receive it as early as possible. Prioritizing your students' needs plays a key role in maximizing the effect of your student support and intervention efforts. By identifying which students need help and the type of assistance they need, they can be guided to the precise combination of services they need to succeed at NSU. Making this identification early in the term—or even before students have started classes—can help you get them on the path to success right away, before they develop problems that may cause them to withdraw.

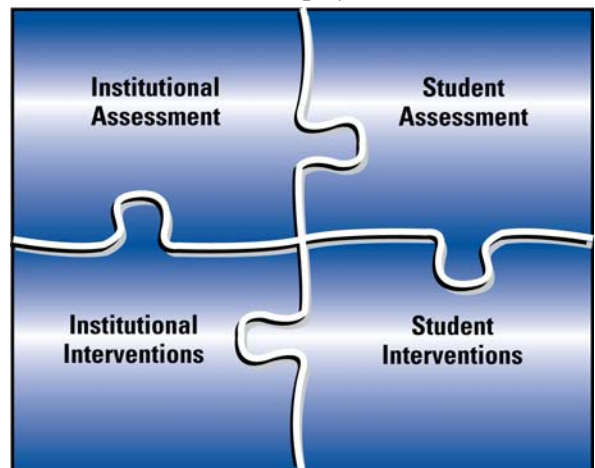
Incorporating this two-tiered retention risk assessment gives you a data-driven process for identifying students at risk, revealing their risk factors, and prioritizing your intervention strategies. This approach is particularly effective because it uses two methods of data analysis to deliver varying levels of student retention factors:

- A predictive model of student retention at NSU, using your own enrollment data, identifies observed risk factors—institutionwide characteristics that predict student success; and
- An online student survey identifies acknowledged risk factors—self-reported areas of challenge for each student in your incoming class.

Combining the results of both analyses allows you to view student retention factors at a comprehensive, campuswide level, to focus on the specific factors that are predominant in individual colleges or programs, and to consider each student's detailed results to guide NSU's retention efforts at all levels.

Delivering data in real time for maximum speed, this retention risk assessment helps you:

- Identify at-risk students and cohorts;
- Implement a systematic approach to student success, using a complete set of diagnostic subpopulation data to guide your efforts;
- Intervene and assist those at-risk students;
- Enhance the effectiveness of your institution's retention efforts by proactively matching student needs with the most appropriate institutional resources; and
- Create an early-alert plan that marshal's your institutions resources most effectively, using the retention database as a guide.



## Step Two: Planning

Next, using the results from these assessments as a guide, I will work with the retention team to develop an action-oriented master retention plan. Through this process we will:

- Continue to develop the retention funnel and collect funnel reports;
- Establish desired outcomes;
- Conduct retention planning visits;
- Discuss essential retention principles;

- Set goals for retention activities;
- Determine strategies to attain those goals;
- Determine a process that ensures action;
- Establish action plans;
- Discuss the role, activities, and responsibilities of the retention team, that has been charged with implementing the strategies in the retention plan;
- Meet individually with a variety of implementation team chairs;
- Meet with the appropriate leaders to ensure incorporation of best practices into specific action plans;
- Assess training needs and create a training plan in order to implement draft goals and strategies; and
- Assess resource needs and create a plan for prioritization of strategies.

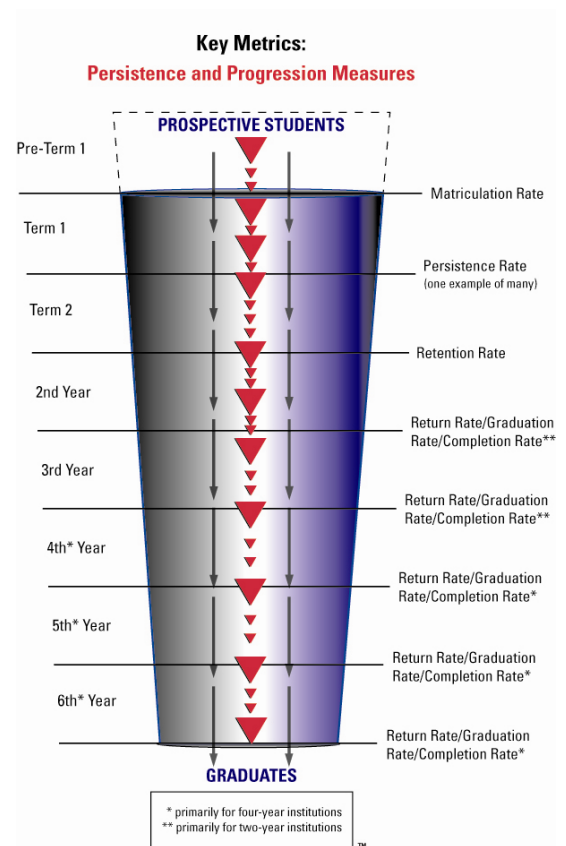
These consultations will be scheduled at intervals to allow retention team members to complete “next steps” and ensure that the planning and implementation process continues appropriately.

### Step Three: Tools

The third step in developing a strong retention program is ensuring that the NSU team has the necessary tools to successfully implement the strategies contained in the retention program. To more proactively address the needs of incoming students, and to more fully engage the members of NSU in the campuswide retention effort, I recommend implementing quality service and academic advising training. I have described each of these in further detail below.

*Improve the academic advising process to ensure students receive the highest level of services available*

Quality advising is vital to student success. In the *2008 National Student Satisfaction and Priorities Report*, when students at university institutions were asked to rank what is most important to them in terms of their overall satisfaction at an institution, academic advising ranked top. It is important to engage your entire advising team—including your most experienced faculty



and staff advisors—in meeting the expectations and needs of your students by discussing the latest best practice information to elevate student success. To better determine the specific needs of NSU, I recommend conducting an assessment of your advising program and policies followed by training through a Webinar series. This assessment and training will serve to examine your current structure and outcomes to determine areas where change could have a positive impact on retention.

Specifically, this process will assist you with:

- Benchmarking the NSU advising program with similar institutions that excel in academic advising;
- Ensuring all students receive adequate guidance in choosing classes, planning their educational experience, and moving to the next level of their education and/or career;
- Ensuring the university is meeting students' specific advising needs;
- Leveraging precious, face-to-face student contact time;
- Bringing substantive, meaningful, tangible, and regular administrative support to advising programs;
- Offering a venue to put forth an institutional definition of advising which reflects the distinctive mission of NSU;
- Helping ensure that students hear consistent messages and experience consistent standards in advising sessions on campus; and
- Allowing students to discover their talents and strengths.

To assist your advisors with their early-intervention strategies, I recommend you enroll your advisors in our recorded academic advising Webinar series. This will support the ongoing integration of key academic advising principles into NSU's retention practices. This Webinar series is designed for groups of faculty and staff advisors.

This program is designed to:

- Motivate faculty and professional advisors, and any other staff involved in advising, to work together to advance advising practices and standards;
- Instill best practices in advising for retention;
- Build stronger advisor-student relationships through advising that is interactive, informed, and motivating for students; and
- Tailor advising for special populations, including undecided and honors students.

### *Improve quality service on campus and teamwork among staff*

While on campus, I briefly outlined the importance of getting everyone on board with the retention effort, including front-line campus staff. From my experience and our student satisfaction research, an engaged and welcoming staff directly supports high student satisfaction rates and collaborative work environments. Clearly, students who feel welcome are more likely to return the following year.

Given your goal to increase retention and student success, I recommend advancing the level of service and teamwork on campus by enrolling a group of 350 of your front-line staff and/or student workers in our short, Web-based quality service course. The employees selected for this training should be from highly visible service areas on campus, including admissions, the business office, and the library, to name a few.

The course teaches skills in:

- Providing excellent service to students and others;
- Using positive communication;
- Taking command of the telephone;
- Halting the “runaround” between campus offices;
- E-mail best practices;
- Giving your professional best;
- Streamlining systems; and
- Assessing service delivery.

Your staff can complete the course’s 12 modules individually at any computer, in just 15-20 minutes per module, in any order you choose. We recommend that you add collaborative activities, described in detail in our course Coordinator’s Guide. The training provides the skills, strategies, and insights that increase positive service experiences across campus. It uses training videos filmed on campuses and can be completed within a few weeks. As a result, employees learn how to make students feel welcome and increase their collaboration with other offices.

### **Step Four: Implementation**

Finally, we will help the retention team at NSU with prioritizing the implementation of successful quality of student life and learning (retention) programs, reviewing and responding to the institutional challenges identified during the assessment phase, maximizing use of staff resources, and institutionalizing long-term practices that engage the entire campus community and support goal achievement long after the project is over.

This includes:

- Meeting with retention plan implementation teams to ensure progress is being made;
- Providing guidance during plan implementation;
- Assessing the status of the retention plan;
- Revising goals and strategies as appropriate for NSU's second annual retention plan;
- Evaluating outcomes of the project by administering an outcomes questionnaire;
- Tracking retention rates (fall-to-fall), persistence rates (course and term), and graduation rates (as appropriate);
- Continually analyzing available and appropriate qualitative data; and
- Determining appropriate next steps for plan development.

## **PHASE II: Execute strategic long term plans and tools to ensure future success**

With the essentials in place including annual plans and processes that maximize efficiency and effectiveness, the next piece of the puzzle is to develop a strategic enrollment plan to guide the direction of the enrollment efforts at NSU and further refine and develop a strong recruitment program including actionable annual plans and data tools. The annual plans provide a more tactical outline of not only what you want to accomplish, but how you intend to do it. The Strategic Enrollment Plan will help to ensure that the actions you are taking now will help bring you to your long term enrollment goals. Incorporating predictive modeling and financial aid research into your program will help NSU work smarter and more strategically in recruiting the quality and quality of students you desire while maximizing both staff and monetary resources. It will also provide you with the necessary data and resources to set and achieve both short- and long-term goals.

### **Create a strategic enrollment plan to guide longer-term goal setting and achievement efforts**

During my visit to NSU, we discussed how the changing marketplace in Oklahoma and nearby markets has brought with it significant pressures to become more efficient and effective. We also looked at longer-range trends that will impact enrollment at NSU in the coming years. Too often, even in the face of significant pressures, we see enrollment management programs getting stuck at the tactical level, guided only by an annual enrollment plan.

To respond to these pressures, I recommend that you work with us to develop a longer-term Strategic Enrollment Plan (SEP) to gain greater control over the college's future enrollment and fiscal outcomes. This type of plan is a lynchpin in ensuring that institutional goals are met and will assist you with making the changes necessary to adapt to the changing environment. With an effective SEP in place, NSU will be on track for sustained success by connecting its institutional mission, current state, and future environment to long-term enrollment and fiscal health.



At the heart of the SEP will be measurable, longer-range goals and broad strategies that reach across the college's divisions. This includes the traditional areas of recruitment, retention, marketing, and financial aid but also areas referenced on the diagram that influence or intersect with enrollment.

To assist you with developing the SEP, we will provide 15 months of side-by-side support, including eight units of consulting (16 days on-site, 16 days off-site) with ongoing access to your consultant between visits by telephone and e-mail. In addition, we will kick off the planning process by conducting high-level research that assesses the impact of today's changing marketplace on NSU.

Specifically, we will help NSU:

- Appoint a strategic enrollment planning council that is comprised of representatives from appropriate departments;
- Guide you in the creation of a team environment that is conducive to effective decision-making across multiple departments;
- Evaluate institutional research and conduct external environmental scans (as described below);
- Help your strategic enrollment planning council to review NSU's institutional mission and establish long-range goals for enrollment and net revenue, including pricing, positioning, and programming;
- Establish key strategies that describe how the goals will be achieved and define changes, where necessary, to NSU's approach;
- Develop detailed action plans with timetables for each of the strategies and a set of metrics that NSU can use to monitor implementation and results; and
- Make certain that critical elements of the SEP are reflected in your annual marketing, recruitment, financial aid, and retention plans.



Strategic enrollment planning will guide NSU through the challenges of the changing environment in the coming years.

Note that depending on NSU's approach to institutional strategic planning, the SEP may also serve the dual purpose of updating NSU's institutional strategic plan.

### *High-level research for strategic enrollment planning*

As a foundation for NSU's strategic planning work, we will develop a data-based "strategic profile"—a summary of market-related characteristics that impact NSU's enrollment potential and marketability. Drawn from institutional as well as secondary data sources, this snapshot will

facilitate a high-level strategic review of the university's readiness to achieve its purpose and vision.

This profile will focus on three key areas: the institution, the marketplace, and the competition, giving NSU a 360-degree picture of its strategic enrollment landscape. We will:

- Analyze data on such topics as:
  - The competitive environment;
  - Key demographic trends that will impact the institution in the next 10-15 years;
  - Enrollment trends; assessments of NSU's financial health; and
  - The appeal of NSU's academic programs based on student demand.
- Present comparative data for NSU and its top 10 competitors in areas such as:
  - Enrollment trends;
  - Tuition pricing trends;
  - Annual revenue trends;
  - Discount rate trends;
  - Geographic analysis of competition density based on local/regional/national status;
  - Ratios of student enrollment to number of academic majors;
  - Key student satisfaction measures; and
  - Graduation rates.

In addition, your SEP will be guided by the substantial new levels of decision data available from the use of our annual planning support, and the research and technologies.

### **Refine and implement strong annual recruitment plans that help build toward long term enrollment goals**

Following the development of the annual recruitment plan outlined on pages three to five, we will continue to work with the recruitment officers on a quarterly basis for the following year. We will assist your team with developing and implementing the annual plan for 2011 with special attention paid to refining the 2010 plan and coordinating with the strategic enrollment committee to ensure the annual plan serves as a tool to accomplish both your long and short term goals.

## Maximize the effectiveness of financial aid awards with strategic financial aid research and consulting support

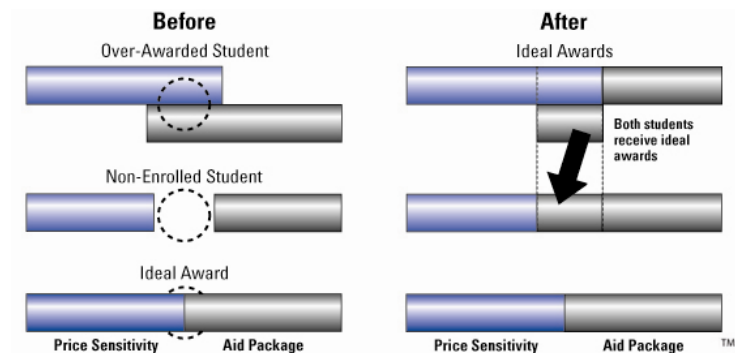
Especially in today's economic environment, it is vital that NSU effectively leverage your available financial aid and scholarships to ensure students' needs are met while protecting the institution's revenue. Without the right data and plan you may be over-awarding financial aid to some students and under-awarding others, which can adversely affect your net revenue. This is a delicate balance that can best be achieved with research, proven strategies, and accurate and relevant data.

One of the best opportunities to meet the overall recruitment goals at NSU is to develop a sound financial aid platform. Our team will work with you to determine your campuses priorities and then build a financial aid plan that will maximize revenue while prioritizing your areas of emphasis within your entering class. By using your financial aid and scholarships more strategically, you could better meet our campuses needs by enrolling the quality and quantity of the students we need to succeed.

To strengthen these areas, I highly recommend custom financial aid research and strategy development, which comes with the dedicated support of a Noel-Levitz financial aid consultant and a technical data specialist.

Overall, this type of research helps you:

- Plan your financial aid policies more strategically to support your new and continuing student enrollment goals;
- Understand the impact of tuition and aid changes on new student enrollment behavior using econometric modeling;
- Gain control over new student enrollment yields, discounting, and net revenue;
- Learn if you are over- or under-awarding financial aid;
- Determine the net tuition prices (published tuition less financial aid) required to recruit and retain your desired student population segments, such as students in Tulsa county; and



In traditional financial aid awarding programs, many students are over-awarded while others are under-awarded leading them to choose not to attend. Our financial aid research helps you determine how much financial aid each student needs to enroll at NSU.

- Make strategic decisions based on accurate data and analysis.

Our service is the most comprehensive available with proven statistical tools and dedicated staff that stay with you throughout the entire awarding cycle.

*Key deliverables include:*

**Continuous support throughout the recruitment cycle by dedicated consultants and data specialists:** We will stay with you throughout each week of your financial aid awarding cycles, providing weekly monitoring reports and expert counsel so you always know your precise expected yield, discount rate, and net revenue, and so you always have the data and our experience to back up any mid-course adjustments you deem necessary.

**Comprehensive historical analysis of your students' enrollment behavior:** A comprehensive historical analysis of students' enrollment behavior related to their need, academic credentials, population segment, and financial aid offers (approximately 100+ pages) analyzing up to five population segments of NSU's choosing. These could include key populations such as first-year students, transfer students, in-state, out-of-state, etc.

**Data-driven analysis of retention factors:** A complete assessment determining whether financial aid or other factors were involved in students' decisions to return the following fall. We will identify pockets of attrition based on need, academics, and/or other factors.

**Develop an annual plan for linking enrollment goals to financial aid strategies:** We will work with NSU to develop an annual plan that contains very specific enrollment goals and financial aid strategies for each student population, academic group, and need level. Changes in direct costs, outside aid, EFC, and projected enrollment are considered in order to estimate the cost of the goals and establish net revenue targets.

**Construct a four-year enrollment and net revenue projection model:** We will assess the longer-term impact of changes in direct cost, retention rates, residence hall occupancy, and financial aid policy. This modeling process will allow Noel-Levitz and NSU to conduct a simulation of alternative policies.

**Develop an econometric model to measure sensitivity to price:** This model will measure student price sensitivity and statistically indicate the relative impact on yield of changes in the university's financial aid strategy.

**Weekly enrollment and net revenue tracking system:** We will provide weekly tracking reports containing the size and characteristics of the admitted student population compared to the established goals. These reports also track the commitment of financial aid in comparison to your goals until the class is finally enrolled. This allows you to make adjustments to your strategies based on real time data to keep you on track in meeting your enrollment goals.

**Data Analysis Research Tool™ (DART):** We will also provide the Data Analysis Research Tool, a query and mapping software to further analyze the historical and retention data sets developed for the analysis. This is a very valuable resource for non-technical staff, and provides a rich database for the professional researcher.

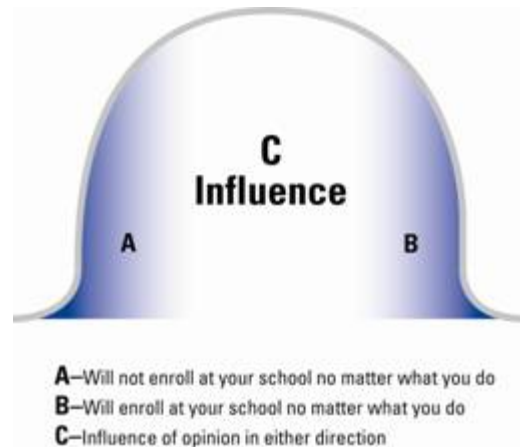
### **Incorporate predictive modeling to qualify and grade your inquiry pool early and often**

Funnel management has become a vital element in successful enrollment programs. A key component to this is forecasting the behavior of prospective students in recruitment funnels, determining with high accuracy which students are most likely to enroll. This allows you to shape your enrollments with precision, while also using resources much more efficiently and strategically.

As I mentioned during our meeting, your overall conversion rate (inquiry to applicant) is 44.6 and yield rate (application to enrollment) is 59.7 percent for first-time freshmen, compared to the national averages of 33 and 38 percent. These rates, along with the increased number of inquiries you will building in the first part of our partnership, means your campus needs to identify more precisely which students you can influence to enroll, prioritize which of those should be contacted first, and determine how often they should be contacted.

Providing your admissions team with the tools necessary to more effectively and efficiently work the funnel is critical to the short- and long-term enrollment success at NSU. Incorporating predictive modeling into your funnel management cadre will allow you to:

- Segment students by their likelihood to enroll scores, scoring your pool as often as you like in batches of any size;
- Prioritize valuable staff time on high-probability students;
- Reduce mailing, travel, and telemarketing costs by pre-qualifying each student; and
- Target communications to specific populations, thereby increasing time and cost efficiencies;
- Make better recruitment decisions based on the additional appended data we provide on each student, further targeting your efforts by characteristics such as ethnicity, geographic location, and other socio-economic factors; and



Identifying where students fall in your pool will help you to strategically communicate and intervene with students you can influence to enroll.

- Access your predictive modeling data from any computer through a secure, Web-based application.

*Key deliverables include:*

**Side-by-side consulting support for your entire team:** At the start of this initiative, your consultant contacts you to review project goals, collect data, and answer questions. Your consultant visits campus to discuss the model and scoring process and assist you with any questions you may have. Your consultant works with the designated NSU team to develop a plan for focusing staff time and concentrating efforts based on the scores, communicating with key applicants, and cutting costs. Your consultant also remains in contact to help with refinements to the plan and provide technical and consulting support via phone and e-mail throughout the entire project. Note: Throughout this project, we will work with your team to assist you in understanding the outcomes and data from each model and translate those into stronger strategies for NSU.

**Leading Software and support to help ensure accurate data:** A Technical Product Support Specialist (TPSS) works with you to gather and clean data from your previous recruiting class, including enrolled and non-enrolled student data. Our statisticians use software from SAS, the leader in analytics software, to create custom-built, multi-variable predictive models. We use your own historical enrollment data and precise Acxiom appended data to build a campus-specific model to predict enrollment

Christopher Edwards	.99	Highly Likely
Matthew Howard	.88	Highly Likely
Jessica Martin	.79	Highly Likely
James Turner	.72	Likely
Ryan Hamill	.68	Likely
Emily Anderson	.56	Likely
Amanda Nelson	.42	Somewhat Likely
David Johnson	.31	Somewhat Likely
Sarah Matthews	.12	Less Likely

**Additional appended socio-economic data:** We append additional data—including Personix lifestyle data, average household income data, and ethnicity codes—that help you shape your incoming class. These appended data identify applicants who fit your desired profile at the individual household level, a level of precision unmatched by other predictive models for admissions.

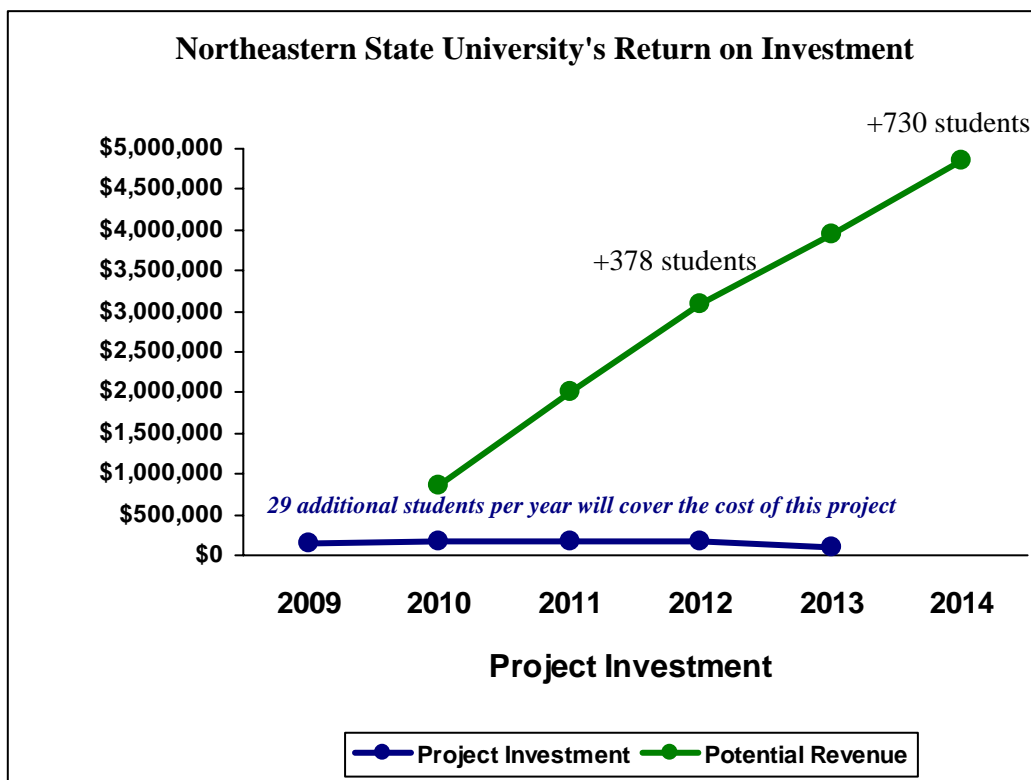
**Web-based data control tool:** This tool identifies duplicate and inconsistent records, provides CASS certified addresses, and updates tables and codes. It then appends economic and socioeconomic information to each student record. This tool also allows you to score your pool as often as necessary as it changes and develops.

**Help to maximize the usefulness of your data:** We provide the **ForecastPlus Query Tool™**—a Web-based query, planning, and mapping tool for matching the students you want to your mail flow, telecounseling plans, message strategies, and/or admissions counselor assignments. The mapping feature provides a visual, user-friendly query tool that helps counselors target their travel and off-campus outreach activities. The ForecastPlus Query Tool is Web-based and is therefore accessible to any staff with user rights when they are on the road.

## Northeastern State University's Return on Investment

According to data I received from NSU, you have an average freshman net revenue of \$5,000. At the current net revenue only 29 additional students per year for four years will cover the cost of implementing this plan. I have outlined below possible returns of investment associated with recruiting additional FTIC students at NSU.

Please note that these calculations are based on the premise that net revenue remains constant over the next three years, which is not likely to be the case due to possible tuition increases. Thus, this is a very conservative ROI with a true potential to be far larger than I have indicated. If NSU fully commits to the recommendation outlined in this plan, we estimate you can reach your enrollment growth goal of approximately 2.5 percent for freshmen and 11 percent for transfer.



These calculations are based on a conservative growth rate of FTIC students as well as improving your current retention rate. I have included the ROI calculations below and would be pleased to walk you through them during our telephone conversation.



## Potential Return on Investment Calculations

Calculations are based on the premise that net revenue remains constant over the next three years.

	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
FTIC Recruitment Gains (projections)	1,113	28	29	29	30	31
Percentage Change in FTIC students		2.5%	2.5%	2.5X%	2.5%	2.5%
Additional Sophomores		16	35	23	0	0
First- to Second-Year Retention %	63.6%	65%	68%	70%	70%	70%
Transfer Recruitment Gains (projections)	1,041	104	115	126	139	152
Percentage Change in Transfer students		10%	10%	10%	10%	10%
Additional Juniors and Seniors*		24	56	37	0	0
Total Enrollment	9,231	9,432	9,546	9,609	9,778	9,961
Cumulative Net Revenue Increase		\$854,565	\$2,021,763	\$3,099,099	\$3,3941,974	\$4,857,896

\*Increases in juniors and seniors are assumed based upon improvements in first- to second-year retention for both FTIC and transfer.





## Northeastern State University's Investment

Below is a matrix that provides information on the intended outcomes and costs for each proposed initiative contained in this Implementation Plan.

### **PHASE I: Implement immediate strategies and plans to shape your recruitment and retention efforts for 2010 and beyond**

#### **Develop an annual marketing and recruitment plan to drive your new student enrollment program**

\$170,000

- Review previously produced studies and reports dealing with enrollment issues and written critiques of the recommendations and comments
- Establish clear and realistic annual enrollment goals and operational benchmarks by student cohort
- Establish a realistic implementation strategy and schedule
- Analyze the overall application process and devise strategies to lower the incomplete application ratio
- Develop specific strategies to boost enrollment, especially among under-enrolled programs
- Develop an inquiry pool of the right size and shape to meet stated enrollment goals
- Create and execute an integrated prospective student communication system consisting of personal, written, telephone, and electronic contacts designed to boost conversion and yield rates among academically qualified and diverse students
- Analyze your current Web site and e-communication strategies and provide assistance with institutional branding and market research practices
- Develop a plan for the professional staff to follow up with students at each stage of the enrollment funnel
- Develop market segmentation strategies
- Provide assistance in using data and information to support enrollment planning and decision making
- Assess the adequacy of staffing and organizational structure as it relates to recruitment
- Review current counselor territorial assignments and reaffirm or revise enrollment goals
- Develop cost-effective admissions outreach strategies to optimize the number of contacts
- Mobilize the campus and volunteers in support of the enrollment effort
- Monitor progress of goal attainment
- Analyze the resources available to support the recruitment effort

- 
- Five registrations to be used at any 2010-11 Noel-Levitz conference or workshop
  - Analyze data from your previous enrolled classes and indicators collected from NRCCUA
  - Develop a predictive model specific to NSU to rate, by statistical probability to enroll, names in NRCCUA database
  - Score a NRCCUA simulation database and provide NSU with the highest scoring records and the entire NRCCUA database for the future year
  - Append your purchased selection with modified data allowing NRCCUA to deliver updated data to NSU
  - Assist with planning segmented search strategies and with making plan refinements as necessary as you implement your strategies

**Develop a strategic plan to use financial aid and scholarships to support the achievement of recruitment and retention goals**

\$42,000

- 
- An evaluation of financial aid impact and involvement in the recruitment and retention programs and services
  - An evaluation of current financial aid and scholarship awarding policies and procedures
  - An assessment of financial aid office's customer service orientation
  - An assessment of staff capabilities in dealing with the intricacies of both financial aid awarding and counseling
  - A review of current student, faculty, and other staff attitudes toward financial aid
  - An assessment of communication systems provided to financial aid applicants, currently enrolled students, and families of both groups
  - A review of financial aid procedures and policies including external (federal and state) reporting processes
  - A review of data processing capabilities
  - A review of institutional policies having direct impact on financial aid

**Strengthen your admissions Web site content to create an inviting and persuasive experience for students**

\$59,000

- 
- Review of current site , analytics and social media practices
  - Competition review—up to eight sites and major social media resources
  - Online survey or online usability test for one market
  - On-campus presentation of findings and recommendations
  - Creation of a Web and Social Media strategy document
  - Create up to 30 new pages of original text and edit an additional 20 pages for the site with up to three rounds of edits for each page
-

- 
- Create a Search Engine Optimization Strategy Blueprint developed for each page assignment
  - Evaluation of post-launch site analytics (six to eight weeks following launch) to make final recommendations

**Develop a comprehensive retention program that engages the campus community**

\$134,643

- 
- Analyze institutional goals in conjunction with the current retention state, including NSU's retention structure and relevant reporting relationships
  - Analyze NSU's retention funnel, non-persisters' profile, and reviewing funnel reports
  - Meet with senior staff, faculty, students, and deans to discuss and create a retention committee
  - Present workshops to faculty and staff on the results from the assessment phase
  - Continue to develop the retention funnel and collect funnel reports
  - Establish desired outcomes
  - Conduct retention planning visits
  - Discuss essential retention principles
  - Set goals for retention activities
  - Determine strategies to attain the goals
  - Determine a process that ensures action
  - Establish action plans
  - Discuss the role, activities, and responsibilities of the retention team, who has been charged with implementing the strategies in the retention plan
  - Meet individually with a variety of implementation team chairs
  - Meet with the appropriate leaders to ensure incorporation of best practices into specific action plans
  - Assess training needs and create a training plan in order to implement draft goals and strategies
  - Assess resource needs and create a plan for prioritization of strategies
  - Track implementation
  - Develop monthly and quarterly action plans
  - Assess current retention practices that affect undergraduate retention
  - Set realistic annual return rate goals from specific populations

**Gather fresh data to determine student satisfaction**

- Phone consultation to guide the administration of the Student Satisfaction Inventory™
  - The Student Satisfaction Inventory™ for 2,300 students for administration ASAP
-

- 
- 10 comparative summary reports per student cohort
  - Assistance with interpreting the findings and developing retention strategies to address the identified priorities for improvements

Implement a systematic, data-drive approach to student success by identifying at-risk students and intervening early

- A technical data specialist works with NSU to collect data on your past enrollment
- Append your data with socioeconomic and demographic data to create a predictive model
- Determine NSU's observed risk factors—the general factors influencing persistence at your campus.
- Apply model to your current student population
- Place each student into one of six risk categories, from most likely to least likely to persist.
- Students complete an online survey that includes 18 standard questions designed to identify self-reported risk factors
- You add up to 20 customized survey items
- Determine acknowledged risk factors for each student.
- Analyzes students responses
- Deliver specific feedback to students in a real time, online format
- Access to an online dashboard that helps you manage and analyze the data
- Training on the use of the dashboard to access reports on risk factors and other key information for each student cohort
- Support on how you can use this data to guide your retention planning.
- A retention consultant works with you to determine appropriate goals and strategies as derived from the retention data contained within the dashboard

Improve the academic advising process to ensure students receive the highest level of services available

- Analyze data and conduct focus group interviews on campus
- Examine systems, policies, procedures, facilities, training, and interactions that relate to academic advising
- Work with advisors to develop effective advising strategies using best practices from like institutions
- Make recommendations on specific ways to improve academic advising
- Registration to three Academic Advising Webinars recordings
- Resource materials for campus coordinators and participants
- Provide a written executive summary with findings and recommendations

Improve quality service on campus and teamwork among staff

- 
- Phone consultation to develop a staff training process and format that will work for advancing quality service standards at NSU
  - Licenses for 175 participants (good for 12 months)
  - Online Coordinator's Guide

**PHASE II: Execute strategic long-term plans and tools to ensure future success**

**Create a strategic enrollment plan that guides longer-term goal setting and achievement efforts**

\$94,500

- 
- Develop a plan for communication and buy-in
  - Educate participants on suggested SEP definition, principles, and phases
  - Conduct in-depth self-assessment
  - Align enrollment planning with mission and vision
  - Establish enrollment-related KPI that will drive the SEP
  - Identify the current and long-range projected situation analysis related to the KPI
  - Assess current supporting data and management reports and their use
  - Identify appropriate internal research and analyses to support the SEP, KPI, and subsequent strategy development
  - Conduct high-level external environmental scan research to further instruct planning
  - Identify strategies that have the greatest potential for optimizing the KPI
  - Establish quantifiable goals based on the strengths of strategies
  - Identify the resources required to execute the plan
  - Craft a strategy to fund the SEP
  - Develop and revise internal policies
  - Address internal and external political implications
  - Provide and monitor appropriate support for all elements of the plan
  - Develop procedures and acceptable metrics for evaluating the execution quality, funding, and timeliness
  - Develop monitoring procedures for these metrics
  - Establish scorecards to measure KPI
  - Develop monitoring procedures for scorecards
  - Establish procedures for modifying the plan
-

**Refine and implement strong annual recruitment plans that help build toward long-term enrollment goals**

Quarterly visits for one year \$42,000

- Continue to monitor and develop an inquiry pool of the right size and shape to meet stated enrollment goals
- Refine strategies to boost enrollment, especially among under-enrolled programs
- Establish clear and realistic annual enrollment goals and operational benchmarks by student cohort that work with the strategic enrollment plan
- Establish a realistic implementation strategy and schedule
- Develop and monitor market segmentation strategies
- Mobilize the campus and volunteers in support of the enrollment effort
- Monitor progress of goal attainment

**Maximize the effectiveness of financial aid awards with strategic financial aid research and consulting support**

Cost per year for three years \$42,000<sup>1</sup>

- Analyze past financial aid and enrollment data thoroughly to determine the effects of current awarding policies on enrollment, retention, and net revenue
- Assist with interpreting the findings and developing a plan to take advantage of identified opportunities
- Project the impact of policies before you enact them
- Distribute weekly tracking reports to monitor goal attainment
- Provide query and mapping software for analyzing the historical student database

**Incorporate predictive modeling to qualify and grade your inquiry pool early and often**

Cost per year for three years \$20,000

- Provide a data control and cleaning tool
- Analyze data from previous inquiry pools and enrolled classes, as well as data we provide (see next entry)
- Add appended socio-economic data to each student record for additional analysis and targeted recruiting
- Develop a custom predictive model to statistically rate, by likelihood to enroll, each inquiry in the inquiry pool.
- Provide Web access for scoring additional inquiries

<sup>1</sup> This price reflects a discounted cost for purchasing three years of our net tuition pricing research. Should you choose to purchase just one or two years, the cost for this service will be \$48,000 or \$43,000 per year, respectively.



- 
- Assist with developing a segmented inquiry follow-up plan for cutting costs and concentrating efforts based on the scores
  - Remain in contact with you to fine-tune changes in strategy and to monitor model performance
  - Provide explanatory charts, graphs, and maps
  - Provide query, planning, and mapping tool for matching specific scored segments with mail flow, telecounseling plans, travel plans, message strategies, and/or admissions counselor assignments
- 

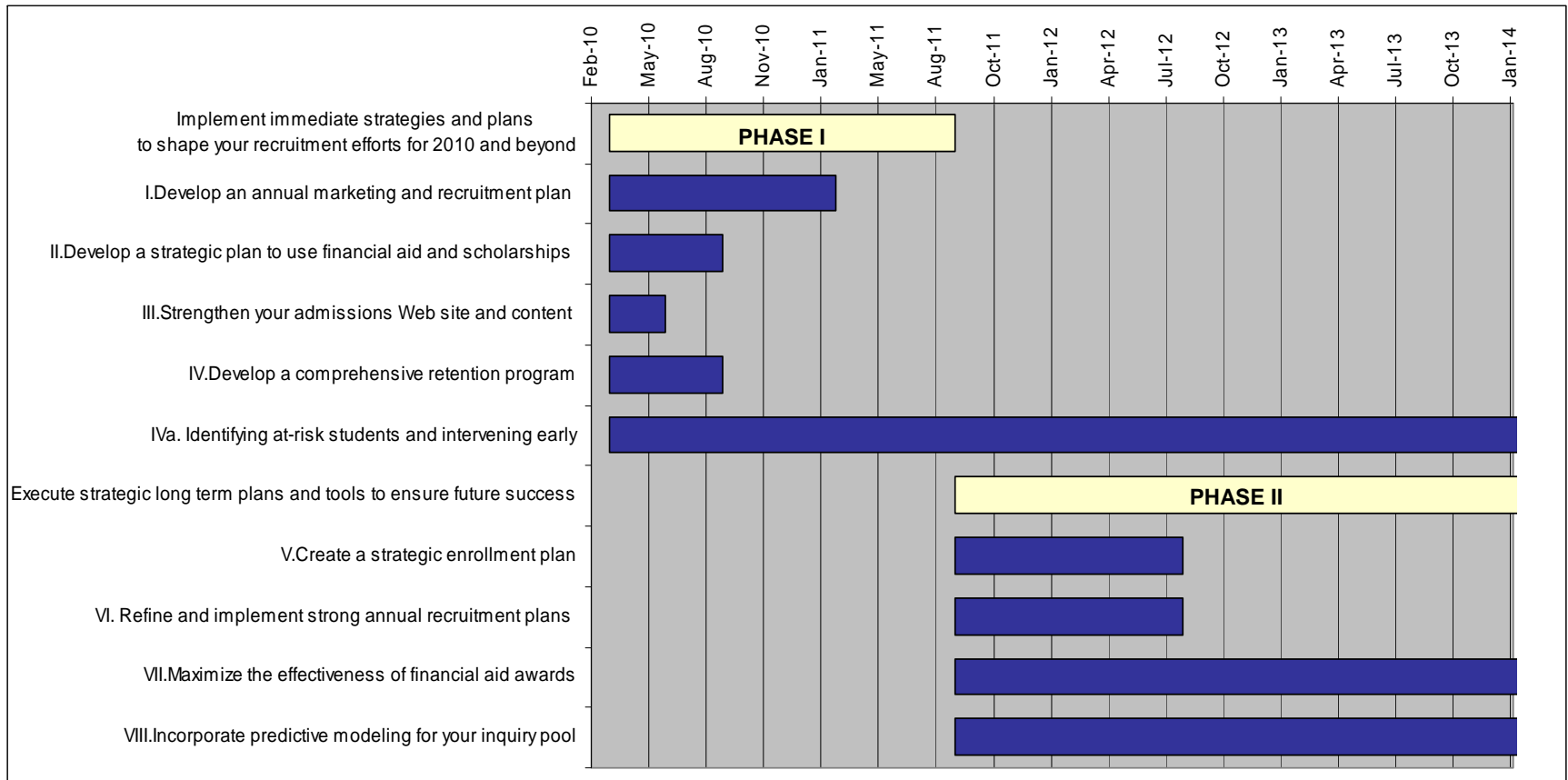
Project Total*	Fiscal Year One (July 2009- June 2010)	\$149,925
Note: You will only be billed for the services you are using at the time. Contracting the entire project now will allow you to secure the services at the current 2010 pricing for the duration of the contracted terms.	Fiscal Year Two (July 2010- June 2011)	\$162,718
	Fiscal Year Three (July 2011- June 2012)	\$161,250
	Fiscal Year Four (July 2012- June 2013)	\$161,250
	Fiscal Year Five (July 2013- June 2014)	\$93,000

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\*Project can be adjusted to match your needs during our telephone appointment. Note that travel expenses will be billed as they are incurred.

## Project Timeline

Below is a chart that provides information on the specific timeline for each proposed initiative contained in this Implementation Plan.





## Next Steps and References

I look forward to talking with you the week of February 8 to discuss the recommended Implementation Plan. In the interim, I encourage you to review and contact the following references. These institutions are similar to NSU in enrollment growth goals and institution type. I can send you additional references if needed.

### University of Arizona

Dr. Richard Kroc  
Director, Institutional Research  
520-621-8543  
kroc@u.arizona.edu



#### **Objective**

Improve the academic profile, diversity, and retention of incoming classes while working with the significant demographic changes in Arizona and the Southwest. Ensure fiscal responsibility through efficient use of financial aid resources and appropriate mix of undergraduates.

#### **Action**

Set goals for recruitment and retention, design a comprehensive long-range enrollment plan to achieve the goals, and implement new strategies and tactics, including conducting a financial aid analysis.

#### **Results**

The University of Arizona has implemented nearly 100 of the strategies and action plans developed. The profile and mix of the fall 2005 class was encouraging. Improvements in the university's academic profile, diversity, student retention, and financial aid effectiveness indicate that it is headed in the right direction.

*We are more data-driven now. We are able to evaluate our situation, gather appropriate information, and assess the impact of what we are doing through systematic follow-up on the outcomes. We've made the jump to a more systematic approach to enrollment management.*

*Timing was critical in our success. Once we had the support of our high-level administrators and the enrollment management structure in place, Noel-Levitz was able to motivate us to get to the next level. Most of all, we were impressed by the expertise of our lead consultants, who kept us focused and actively participating each step of the way. We are seeing more collaboration on campus with our marketing, recruitment, and retention efforts and are working with the Colleges and academic units to ensure that enrollment management is a campuswide effort.*



## Utah State University

Dr. Joyce Kinkead  
Vice Provost for Undergraduate Studies and Research  
435-797-1706  
joyce.kinkead@usu.edu



### ***Objective***

The university had multiple enrollment goals, including enrolling higher-ability students to build the honors program and increasing the freshmen-to-sophomore retention rate from 66 percent to 75 percent within a five-year period.

### ***Action***

The university enlisted Noel-Levitz for a two-stage project. In the first stage, a comprehensive written enrollment plan was developed and implemented, custom enrollment strategies were employed, and Noel-Levitz worked with staff training and development. Next, the university worked with Noel-Levitz to develop a holistic retention plan that engaged the entire campus in the retention process.

### ***Result***

Utah State University was able to reach its retention goal of 75 percent in two years instead of five. In addition, the proportion of honors-eligible students in the freshmen cohort has risen from 10 percent to 18 percent in four years' time. In the first year after implementation, average ACT rose from 22.3 to 22.9, average GPA increased from 3.37 to 3.46, number of students admitted with less than a 3.0 GPA dropped from 597 to 378, and students with an ACT above 26 who enrolled went from 625 to 642. In addition, the university reached its average ACT goal of 24 just three years after engaging Noel-Levitz. Average GPA continues to climb and now stands at 3.68.

*With Noel-Levitz's help, we have learned to bring in lots of different units on campus to coordinate and collaborate, so there is a sense that the whole university is engaged, and recruitment and retention are everybody's business.*

*We found we were spending time reinventing the wheel. Noel-Levitz knew where we should be focusing and made our transformation much more efficient.*

## Dakota State University (South Dakota)

Ms. Amy Crissinger  
Director of Admission  
605-256-5696  
Amy.crissinger@dsu.edu



### **Objective**

Strengthen overall enrollment by: 1) increasing new student enrollment three percent a year over the next three years and; 2) increasing first- to second-year retention from 63 percent to 75 percent over the next six years.

### **Action**

The university developed a more formal and comprehensive enrollment plan, including recruitment, marketing, and retention. In addition, the university expanded and integrated its recruitment communication plan and developed more defined messages that permeated throughout its marketing and communication. Among the services Dakota State University utilized are predictive modeling for recruitment and retention and custom marketing communications research.

### **Result**

In the short time since the project began, Dakota State University has been able to increase its inquiry pool, improve its territory management, enhance its reporting with segmented funnel data, and improve institutional aid awarding. Retention rates have increased in the short time since implementing the new strategies.

*We have been able to increase awareness on campus for both the recruitment and retention initiatives. It is no longer just an admission or student services issue, the entire campus has stepped up and assumed responsibility for the success of enrollment.*

*We have not only been able to implement new strategies and processes to help us reach our enrollment goals, but in doing so we have improved other areas outside our primary focus such as recruiting students with a stronger academic profile.*

## University of Southern Mississippi

Kristi Motter  
Associate Vice President for Enrollment  
(601) 266-6187  
kristi.motter@usm.edu



### *Objective*

Under the leadership of a new president, the University of Southern Mississippi sought to increase student enrollment and student retention rates. Specific goals were set to increase the university's market share of Mississippi high school graduates by two percent each year for five years and increase first-to-second year retention rates by seven percent over four years.

### *Action*

The university wanted to bring in additional expertise for long-term strategic planning, so it turned to Noel-Levitz to guide the creation of a strategic enrollment plan. To aid in goal-development, the campus conducted research using the Noel-Levitz Student Satisfaction Inventory for current students along with market research for traditional and non-traditional prospective students. Southern Miss also used financial aid research and econometric modeling to analyze the affects of financial aid awards on student enrollment. This research, coupled with training in recruitment strategies and using predictive modeling to identify which prospective students were likely to enroll, helped Southern Miss develop a holistic approach to enrollment and retention planning.

Research results prompted the university to undertake a new retention initiative and hire a new assistant provost for student success. Using results from the Student Satisfaction Inventory and recommendations from Noel-Levitz consultants, the new assistant provost is implementing an early-alert system, has determined the areas where programs are needed most, and has targeted resources for student success more strategically.

### *Outcome*

Due to the university's new strategic approach to recruitment and retention, Southern Miss saw a 2 percent increase in freshman to sophomore retention last year. In addition, new freshman enrollment increased by 5 percent and total enrollment increased by 3.4 percent. Now armed with a data-driven strategic plan, Southern Miss plans to build on this momentum in the coming years.

*When you have your consultant on your cell phone speed-dial, you know you have an irreplaceable, lasting relationship.*

*Everyone at Noel-Levitz knows there isn't a manual for institutional success. They are able to gather recourses from various places and do what's right for your specific school and situation. The knowledge they leave at your fingertips is invaluable.*

## Tennessee Technological University

Dr. Robert Hodum  
Director of Enrollment Management  
931-372-3636  
rhodum@tntech.edu



### ***Objective***

Tennessee Technological University sought to increase enrollment and retention while improving campus diversity.

### ***Action***

The university utilized Noel-Levitz recruitment consultation, market research, student satisfaction research, retention tools, and quality service training. During this partnership, Tennessee Tech reorganized its enrollment management structure, streamlined its operations, and implemented a research-based strategic approach to the recruitment and retention of target populations.

### ***Result***

The university achieved a 5.7 percent increase in first-year students overall, accompanied by a 53.8 percent increase in first-year African American students. Retention increased as well.

*Noel-Levitz has an outstanding reputation and an outstanding ability to work with universities like ours. We are really able to move our enrollment plan forward. It was a great partnership.*

*Rebecca Tolbert  
Former Associate Vice President for  
Academic Affairs*

## The Noel-Levitz Promise to Northeastern State University

Noel-Levitz helps campuses to exceed their enrollment goals. We promise to provide NSU with the following:

- 1. A trusted partner.** We are committed to working closely with the NSU enrollment team to effect the changes you desire.
- 2. Customized approach.** Because NSU is unique, it requires unique solutions. That's why our first priority will continue to be listening, analyzing, and probing for complete information before making further recommendations.
- 3. Side-by-side plan development and execution.** To develop a more comprehensive enrollment plan, we will work collaboratively with your leadership team to create plans that are specifically designed for your circumstances. We will then assist in executing the plans as well.
- 4. Documented goals and outcomes.** You and your colleagues confirm the specific goals or outcomes to be accomplished within specific timeframes. Our role is to help bring this vision to life. Our track record proves that we can.
- 5. Experience and commitment.** Many of us at Noel-Levitz have been in your shoes, serving as enrollment managers, campus marketing leaders, retention directors, institutional researchers, financial aid directors, faculty, and more. We care about higher education and the students it serves. Our hope is that our efforts will strengthen NSU's programs beyond measure, so that your students will succeed all life long.
- 6. Enrollment leadership development.** To strengthen and empower your enrollment team members, we are committed to openly sharing our knowledge, experience, coaching, and national enrollment research.
- 7. Enduring success.** As we've indicated with the more than 6:1 ROI calculation, your investment in our services should ultimately lead to a financial return that pays for the investment many times over. Our goal is to help NSU thrive, not just succeed.