Where Recruitment and Retention Meet: Building a Plan to Incorporate Best Practices

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A quick overview

1. Some quick SEM foundations

2. Recruitment planning
   – Essential elements
   – Some specific notes

3. Retention planning
   – Creating a strong plan
   – Some common pitfalls

4. What is the relationship between good retention and recruitment planning?

5. Questions and discussion
Some quick SEM basics
SEM Planning Framework

- Sustainable Enrollment Outcomes
  - Tactics
  - Strategies
  - Enrollment Infrastructure
  - Strategic Enrollment Goals
  - Data Collection and Analysis
  - Key Enrollment Indicators
  - Institutional Strategic Plan

Bontrager/Green
SEM Organizational Framework

Executive Team
Institutional strategic plan, approval and champions of strategic enrollment goals and initiatives

SEM Steering Committee
Long-term enrollment goals, securing the approval of strategies through appropriate institutional channels, communication with Executive Team

Recruitment Council
Develop 3-4 strategic goals for new student recruitment; review and approve sub-committee action plans; recommend to SEM Steering Committee

3-4 Sub-Committees
Action plans, time lines and metrics for each strategic goal

Retention Council
Develop 3-4 strategic goals for retention and graduation; review and approve sub-committee action plans; recommend to SEM Steering Committee

3-4 Sub-Committees
Action plans, time lines and metrics for each strategic goal

Data Team
Environment scanning, student enrollment behavior research, enrollment models, provide data to councils as needed

Recruitment and Retention planning, ACT EPC, July 2017
Recruitment planning
The art and science of recruitment

1. Art of recruitment:
   - Interpersonal relationships
     • Building trust
     • Reading intent
     • Authentic interest in student/human welfare
   - Experience
   - Visual/oral appeal of messages

2. Science of recruitment:
   - Use of data to drive strategic direction
   - Use of data to guide planning
   - Use of data to guide individual actions and work plans
Recruitment pressures at all institutions

Financial pressures – Amount spent to recruit, including financial aid

Number of students – class size

Quality of students – preparation characteristics
Recruitment enrollment cycle

- prospect/inquiry phase
- application evaluation phase
- Yield phase
Recruitment enrollment cycle

- Attract and build interest
- Screen and qualify
- Confirm commitment
The traditional enrollment funnel

Admissions Funnel: Prospects to Enrolled
Building the class

Applicant pool

- Inquiries
- Stealth Apps
- Prospects
Strategic class building

- Focused public outreach
- Targeted search
- Marketing and advertising
Search timing – traditional freshmen

At what point in your college research process did you add colleges to your list of schools to which you would apply?

Competitive advantages

1. Assess the institution’s strength against its main competitors

2. Seek to communicate what the institution does well and/or is unique in its offerings

3. These are most effective when aligned with student choice factors
Competitive advantage questions

1. Who are you major competitors for applicants and admitted students?

2. What factors do students use when choosing a college or university?
### Influences and factors

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<th>Influence</th>
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Goals of enrollment marketing
Communications plan

1. Supports the recruitment plan

2. Works on behalf of the admissions office and the institution to provide a consistent, clear stream of key messages

3. Provides the right message at the right time to the right audience:
   - Freshman
   - Transfer
   - Parent
   - Counselor

4. Understanding the communications plan is critical to consistent messaging in recruitment.
Institutional communication strategies

1. Search lists
   – Proactive contact to start a conversation

2. Other names/contacts
   – Reactive contact to continue/stimulate a conversation

3. Communication plans support the ongoing stream of information that reinforce the value proposition of the institution:
   – Identity/mission/unique market position
   – Competitive advantages
Calls to action in the prospect stage(s)

1. Apply for admission
2. Visit the campus
3. Learn deeper information on our website
4. Other?
Territory management

1. Divides the known universe into assigned areas

2. Sets priority levels for recruitment, marketing and communications:
   - Primary: 75-80% of your enrolled students
   - Secondary: Important but not critical
   - Tertiary: Everything else

3. Help your recruiting staff become “mini enrollment managers”
How many applications do you need?

1. Overall number

2. Broken out by territory:
   - Based upon historical trends and averages
   - Stretched as a target/goal for improved performance
   - Informed by demographics and labor trends

3. Broken out by college, major or program

4. Other “sorts”:
   - Ethnicity
   - Special programs
   - Others?
Creating efficiency in completion admission

1. Measure the time it takes to complete an application in your system:
   - Are you asking questions that aren’t used to make decisions for all students?
   - Could some areas of the application be deleted, as a result?

2. Measure the time it takes to make an admissions decision, once all materials are received:
   - Can greater efficiency be created?

3. What percentage of applications are incomplete in your system?
   - How can you increase completion?
   - How do you communicate missing items to students?
Getting to “yes” in the commitment stage

1. Have all applicants received your value proposition and competitive advantage communications?
   - Think about stealth applicants who were admitted quickly.

2. What are the visible signs of commitment from students as they complete their enrollment?
   - Where will they live?
   - How will the pay for it?
   - Are they planning to enroll?

3. Have students connected to the institution?
   - Campus visits
   - Campus events
Helpful tools in understanding application flow

1. Goal setting by assigned territory
2. Velocity reports
3. Access to data and reports that help you manage your assigned territories
Successful on-campus events

1. Planned at key times of the enrollment cycle

2. Content/program:
   - Is designed to correspond with student choice factors
   - Highlights competitive advantages in an overt but not forceful way
   - Allows student to connect to faculty and current students
   - Allows parents to connect with other parents
   - Answers common questions that arise from your student population
   - Creates excitement for enrollment

3. When are your events planned?

4. How well do they align with best practices above in their content?
In-field travel

1. What are the tools used to plan the recruitment travel calendar each year?
   - State association resources/consortia
   - Individual school invitations
   - Enrollment history data
   - Past visit reports
   - Others?

2. What are the cycles of travel for your institution?

3. What is the balance of time expected/spent in the field with other duties?

4. What are some of your expectations and outcomes from travel?
Counselor relations

1. Important communications and relationship-building that is:
   - Sometimes overlooked or taken for granted
   - Harder to conduct in an age where counselors are busy and many times overburdened with student counseling issues

2. Communication plan for counselors:
   - Make sure they know the basic facts on programs, costs, scholarships, deadlines/preference dates, etc.
   - Combine some print and electronic communications

3. Build relationships in areas where you may not be able to visit
Transfer visits and relations

1. Build partnerships, not articulation agreements
   – Led by faculty/academic affairs
   – Staffed and supported by admissions

2. Set appointments to evaluate transcripts and provide unofficial evaluations

3. Events may or may not need to be the same as those for freshman students:
   – Returning adults are less interested in campus life, generally
   – Returning adults are highly interested in practical matters, such as class times, parking, daycare
Retention planning
Elements of a strong retention plan

1. Data informed
   - Search for evidence of claims that are made about why students leave

2. Highly focused
   - On the largest number of students that it can impact
   - On programs/initiatives that have the greatest chance of success

3. Developed in partnership between faculty, student services and others
Sample retention plan goals

1. Increase the percentage of first-time students enrolled in the second year from 75% for fall 2015 – fall 2016 to 80% in fall 2020-2021

2. Increase the rate of winter transfer students who continue to fall from 85% in winter 2016 – fall 2016 to 91% in winter 2021– fall 2021

3. Increase the rate of first-time students who continue from the second fall term to the third fall term from 80% for fall 2015 – fall 2016 to 85% in fall 2020-2021.

4. Increase the six-year graduation rate of first-time students from 42% for the fall 2009 cohort to 50% for the fall 2018 cohort.
Sample retention strategies

1. Develop and implement first-year experience courses for all new freshman and transfer students:
   - Different courses by years of prior higher education enrollment (not counting dual credit)
   - Required
   - Discipline-specific
   - For credit towards a degree

2. Create and implement an academic advisory training program:
   - Required for all faculty and staff who advise undergraduates
   - Includes the development of a training manual/documentation
Some common retention plan pitfalls

1. No benchmarking of retention rate goals:
   – IPEDS data
   – College results online (collegeresults.org) from the Education Trust

2. Too many initiatives:
   – Egalitarian approach
   – Lack of focus

3. Waiting for better students

4. Anecdotal approach to understanding student enrollment behaviors
Where do recruitment and retention intersect?

1. Clear communication and understanding of:
   - Institutional mission
   - Market position
   - Institutional health metrics

2. Admissions policies informed by student success data and studies:
   - What types of students are most likely to be successful at your institution?
   - Where do those successful students live/study?

3. Clear relationships and programs that support the success of every admitted student.
Understand where you are losing students between initial interest and matriculation

Predictive Analytics
Understand where you are losing students between matriculation and completion

Retention Studies
Some pitfalls of using completion predictions with prospective students

1. Many factors that impact success are not available to us in search pools or prospect lists:
   - Motivation
   - Support systems
   - Other non-cognitive variables

2. The impact of entering metrics on retention fade over time as the “college effect” overtakes them in relationship to completion factors
Questions and Discussion
Thank you!

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