



# Developing a Student Recruitment Strategy

The Shifting Enrollment Landscape, Part 1

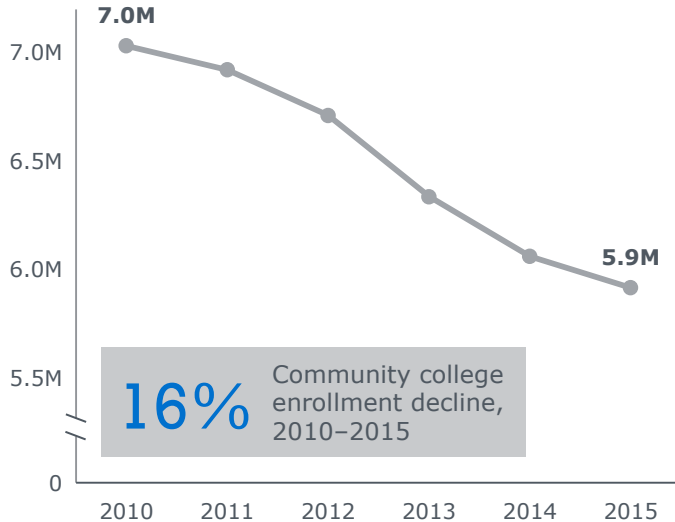
Community College Executive Forum

# Growing Pressure to Recover Enrollments

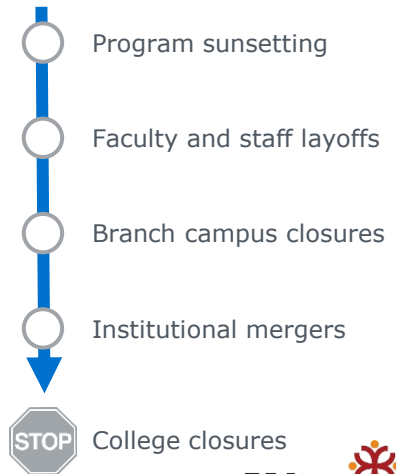
## Persistent Loss of Tuition Revenue Destabilizes College Budgets

### Five Years of Enrollment Declines

*Fall Enrollment at Two-Year Public Colleges, 2010–2015*



### Amid Funding Volatility, No Easy Costs Left to Cut



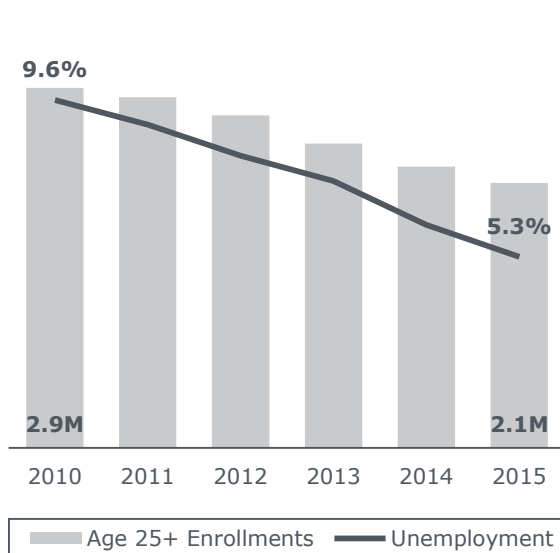
Source: National Student Clearinghouse, "Current Term Enrollment Estimates," 2015; National Student Clearinghouse, "Current Term Enrollment Estimates," 2012; Smith A, "Mergers without Rancor?" *Inside Higher Ed*, 2015; Smith A, "Too Few Students," *Inside Higher Ed*, 2015; EAB interviews and analysis.

# Facing Headwinds from Both Sides

## Economic and Demographic Trends Hold Down College Enrollments

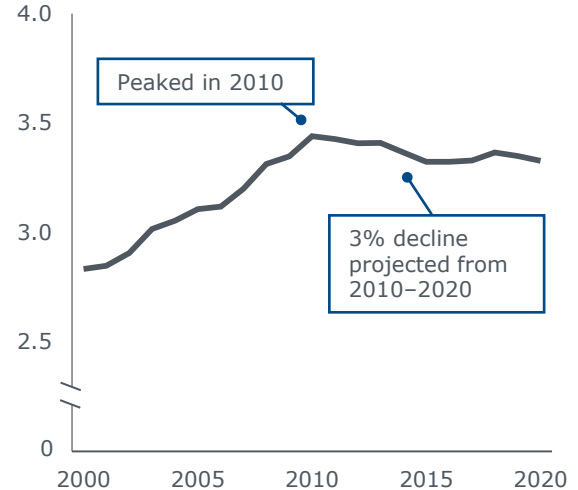
### Adult Learners Returning to Workforce

*U.S. Unemployment Rate vs. Fall Enrollment of Students Age 25+ at Community Colleges*



### High School Classes Shrinking

*U.S. High School Graduates (in Millions)<sup>1</sup>*



Source: Bureau of Labor Statistics, "Labor Force Statistics from the Current Population Survey," <http://data.bls.gov/timeseries/LNS14000000>; National Student Clearinghouse, "Current Term Enrollment Estimates," 2015; National Student Clearinghouse, "Current Term Enrollment Estimates," 2012; National Center for Education Statistics, "Projections of Education Statistics to 2022," 2014; EAB interviews and analysis.

1) Figures from 2012 onward are projections

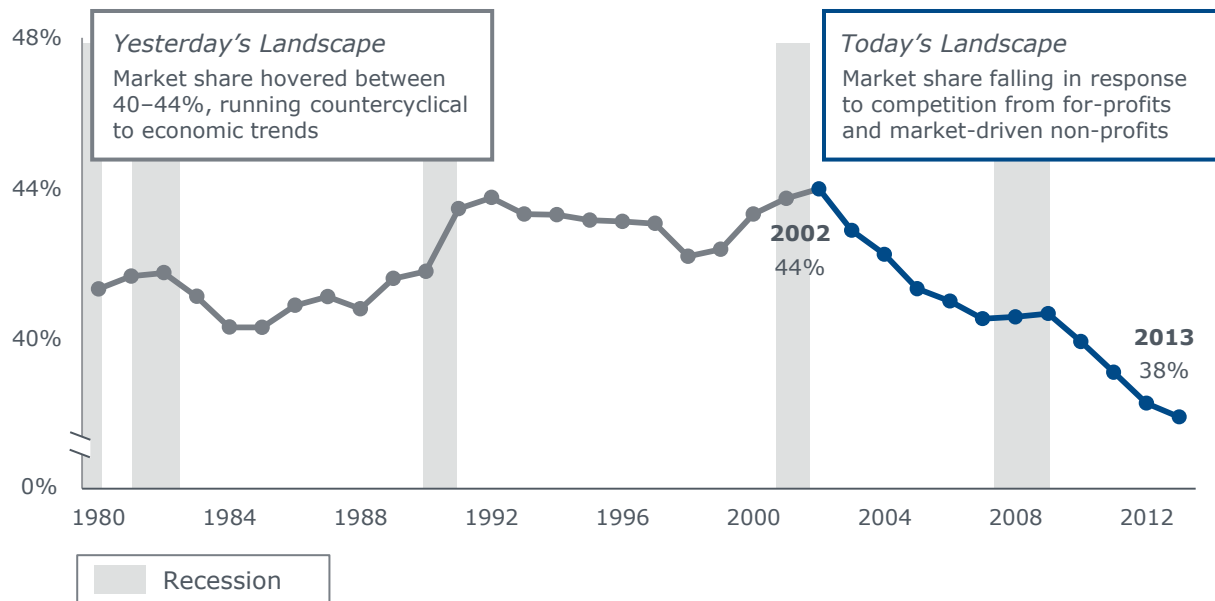


# Not Just a Cyclical Trend

## Community Colleges Losing Market Share Irrespective of Economy

### Share of Total Enrollments in Decline Since 2002

Percentage of U.S. Undergraduates Enrolled in Two-Year Sector, 1980–2013

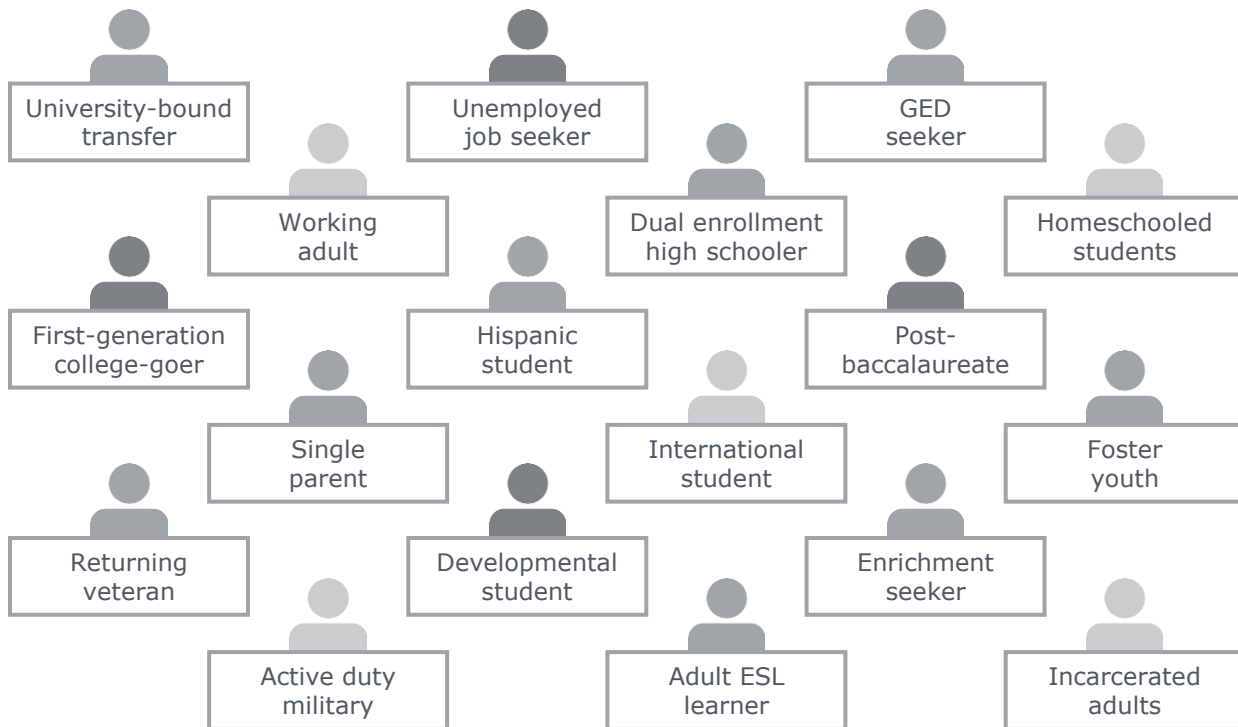


Source: National Center for Education Statistics, "Digest of Education Statistics," 2014; National Bureau of Economic Research, "US Business Cycle Expansions and Contractions," 2012; EAB interviews and analysis.



# Serving an Implausibly Diverse Market

Mission Encompasses an Ever-Growing Variety of Student Segments





# Making Sense of Our Multifaceted Audience

## Two “Meta-Segments” of Prospective Community College Students



### New to Higher Education

First-generation college students, sometimes with non-traditional traits (e.g., adult, working)

**What do they look like?**



Choosing between attending community college and entering workforce

**What are their college options?**



Need help developing college readiness skills and navigating enrollment process

**What do they need from us to enroll?**



### Many College Options

Traditional-age college students who eventually aim to earn bachelor’s degrees

Choosing between attending community college and attending university

Need help seeing value proposition of community college over alternatives

# Pairing Outreach with Recruitment

Dual Marketing Message Must Promote College-Going and Your College

## Outreach Promotes Higher Education



SPIKE ADVERTISING.

## Recruitment Promotes Specific College



DELTA COLLEGE.



“ We need to do outreach, which is saying, ‘College is good.’ However, we also need to do recruitment, which is saying, ‘College is even better if you come to us.’ ”

*Ross Miyashiro, Vice President of Student Services, Coastline Community College*



# The Shifting Enrollment Landscape

## A Roadmap for Today's Conversation

NEW TO HIGHER EDUCATION

MANY COLLEGE OPTIONS

1

### Building a College-Ready Pipeline



How can we maximize our high school partnerships to equip students with college navigation skills?

2

### Increasing Applicant Conversion



How can we help applicants navigate the admissions process and overcome barriers to enrollment?

3

### Competing for Prospect Mindshare



How can we engage prospective students early in the decision process to increase their likelihood to apply?

4

### Capturing the Stealth Prospect



How can we identify and serve prospective students evaluating their college options independently?

5

### Generating Digital Leads



How can we use online marketing and social media to reach an audience that relies heavily on digital channels?





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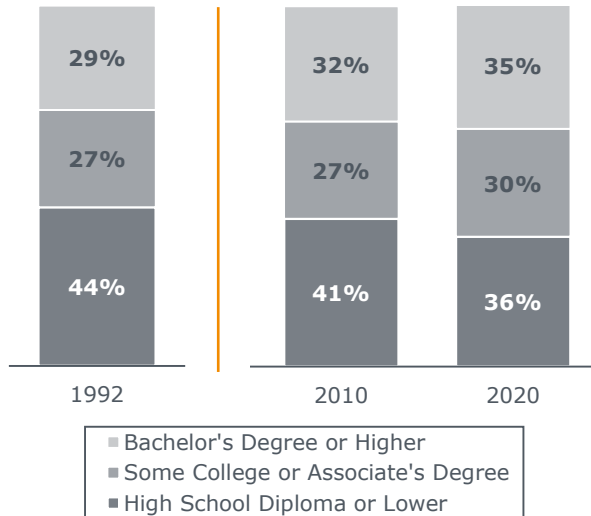
How can we use online marketing and social media to reach an audience that relies heavily on digital channels?

# Not Optional in Today's Workforce

## Some College Required for Two-Thirds of Future Job Openings

### The Long-Term Trajectory of Upskilling

*Distribution of Job Openings by Required Education<sup>1</sup>*



### Few Jobs Left for Workers Without College

“Technological change is accelerating the structural shift into an economy that depends more and more on postsecondary education. As the economic recovery limps along, it is increasingly clear that **most of the jobs that required only a high-school education, especially those male blue-collar jobs, are gone**—and they are not coming back.”

*Anthony Carnevale  
Director, Georgetown University Center  
on Education and the Workforce*

Source: Carnevale A, et al., “Recovery: Job Growth and Education Requirements Through 2020,” Georgetown University Center on Education and the Workforce, 2013; Carnevale A, “The Real Education Crisis is Just Over That Cliff,” *Chronicle of Higher Education*, 2012; EAB interviews and analysis.

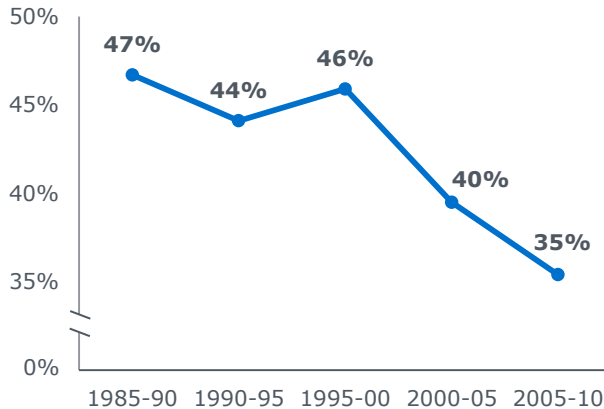
1) Data for 2020 is projected

# The Growing Power of Local

## Relying on Community Colleges as Geographic Mobility Declines

### Staying Closer to Home

*U.S. Five-Year Mover Rate Since 1985<sup>1</sup>*



### Why Aren't Americans Moving?



#### The Changing Face of Work

- Shift away from regionally specialized economies reduces benefit of moving
- Telecommuting lessens need to move to job opportunities



#### The Multi-Generational Family

- Dual-earner households turn to grandparents for child care
- Aging Baby Boomers rely on adult children for support

Percentage of Americans who moved out of state from 2005–2010:

**6%** General Population

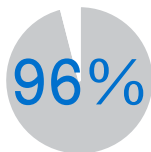
**4%** Hispanic Population



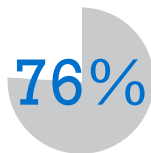
# In Need of College Navigation Skills

Despite K-12 Outreach, Non-Academic Barriers to College Transition Persist

## Extensive Investments in Academic Programming



Percentage of community colleges that offer dual enrollment programs to high school students



Percentage of states that offer early college readiness assessments in 11<sup>th</sup> grade



Percentage of states that offer transitions curricula for high school students needing remediation

## Greatest College Readiness Challenges Non-Cognitive

*EAB Survey of College Executives<sup>1</sup>*

- 1 Unable to finance education
- 2 Coursework disconnected from career goals
- 3 Lacking college support network
- 
- 7 Introductory courses too difficult
- 8 Lecture-drill instruction not engaging

Source: National Center for Education Statistics, "Dual Enrollment Programs and Courses for High School Students at Postsecondary Institutions: 2010-11," 2013; Barnett EA, et al., "Reshaping the College Transition," 2013; EAB interviews and analysis.

1) N=300 community college presidents and senior administrators

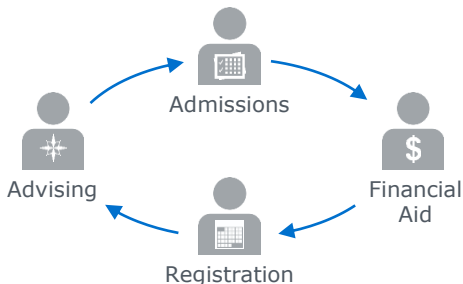
# One-Stop Enrollment Caravan

ACC Student Services Team Hosts College Workshops in High School Halls



## College Connection Program

- Teams of 4–8 staff from various student services departments visit area high schools 3 times per year
- Staff walk students through ideal college enrollment steps from financial planning to career pathing



## A Scalable Strategy to Increase Enrollments



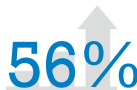
15K

Students participating annually across 25 school districts



\$16

Average cost per student



56%

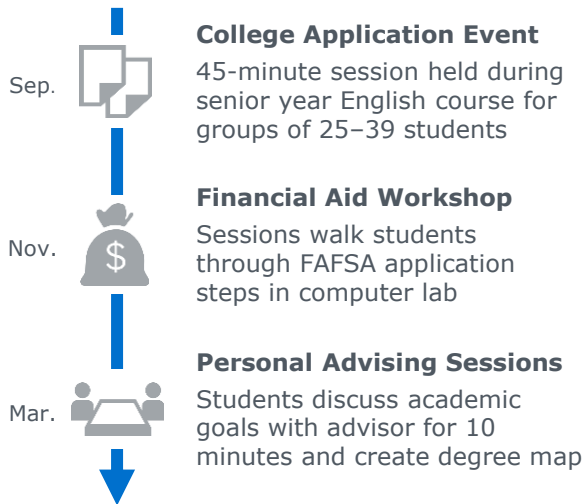
Enrollment increase at ACC among recent high school graduates, 2003–04 to 2012–13

# Access Made Easy



## Keeping Transition Guidance Personalized, Timely, and Mandatory

### Visiting Just Ahead of Major College Deadlines



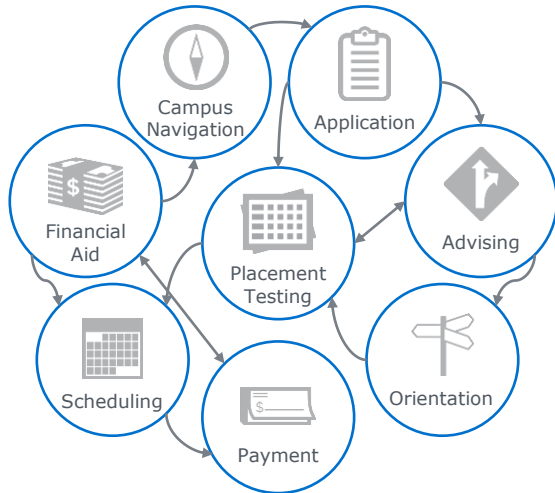
### Key Elements of ACC's One-Stop Caravans

- 1 | Keep visiting staff team consistent to build student trust
- 2 | Host workshops in high schools during regular daytime hours
- 3 | Require all students to attend events

# Losing Students Before Classes Start

Complexity of Admissions Process Deters Applicants from Enrolling

## Our Enrollment Process From the Student's Perspective

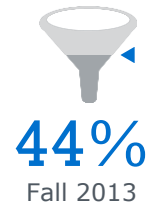
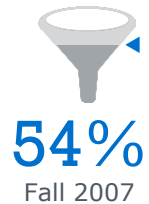


## Process Audit Yields Troubling Results

“We analyzed the steps students take from application to registration and had a flow chart with more arrows, dots, and triangles than I even want to think about. And I have three degrees.”

*Director of Institutional Research,  
Community College (Mid-Atlantic)*

## Applicant Conversion Rates Declining<sup>1</sup>



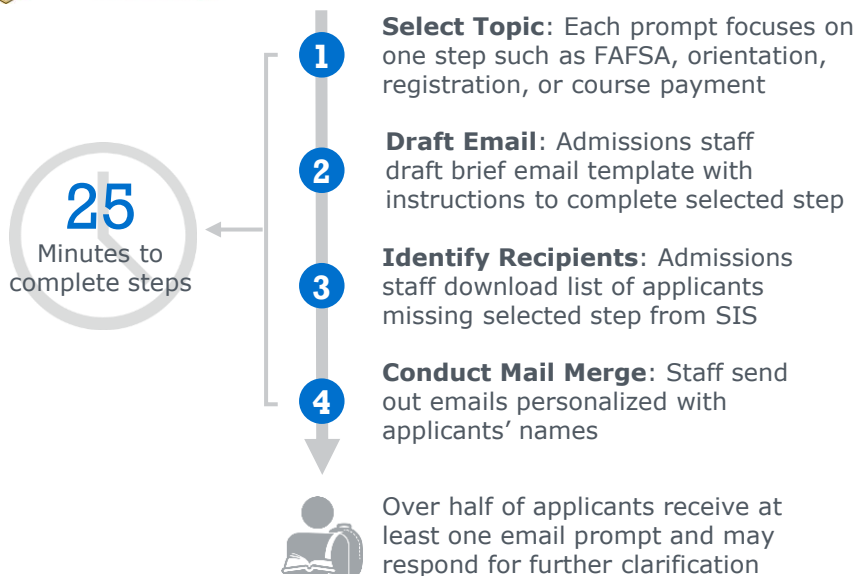
1) EAB data analysis across 45 two-year public community colleges for which application and enrollment data is available

# Missing Step Enrollment Prompts

## Lake-Sumter Sends Calls-to-Action for Each Remaining Enrollment Step



### Reaching Applicants at Little Cost



### Short Email Goes Long Way

62%

Applicant conversion rate in 2015, compared to 59% in 2013

\$191K

Estimated additional tuition revenue per year<sup>1</sup>

1) Assumes students enrolled in an average of 20 credits per year at in-state tuition rate



# Not Your Typical Administrative Letter

Informal, Jargon-Free, and Personalized Messages Prioritize Clarity

## Prompting Next Steps with Brief Emails

*Sample Email for Applicants Missing Orientation*



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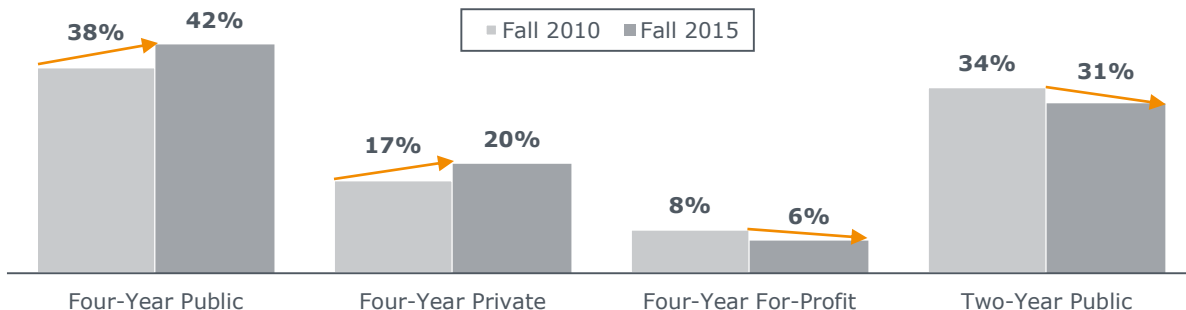
How can we use online marketing and social media to reach an audience that relies heavily on digital channels?

# Universities Capturing Market Share

Source of Competition Shifts from For-Profit to Four-Year Sector

## More Students Heading to Universities

Market Share of Postsecondary Enrollments by Sector



“There’s a presumption among community colleges that we don’t compete with universities, but rather we compete with life. I don’t know if that’s true. **They’re eating our lunch.**”

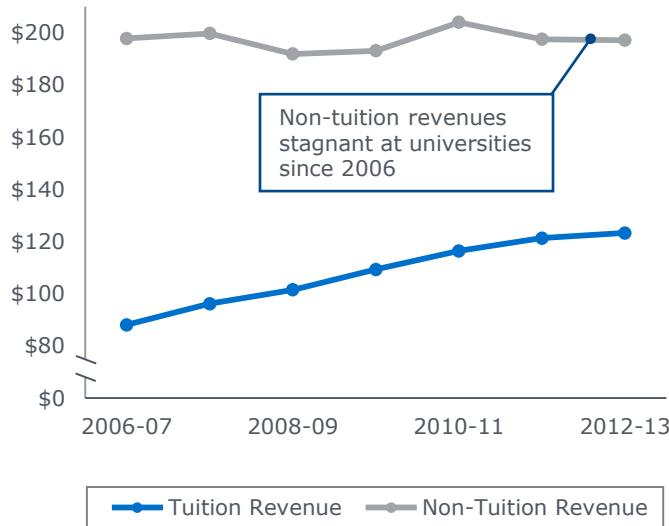
*Janet Gullickson, President  
Spokane Falls Community College*

# Pressure to Grow University Enrollments

Relying on Tuition Revenue as State and Federal Funding Declines

## Tuition the Only Source of University Growth

Total Revenues Across Four-Year Sector (in Billions)<sup>1</sup>



## What Happened to Other Revenue Sources?



26%

Decline in state and local appropriations per FTE for public universities, 2006-07 to 2012-13



11%

Decline in federal research funding for higher education R&D, 2011 to 2014

1) In 2012 dollars

# Competitors Fishing in Our Pond

Universities Replicating Our Value Proposition of Access and Affordability

## Loosening Admissions Standards...

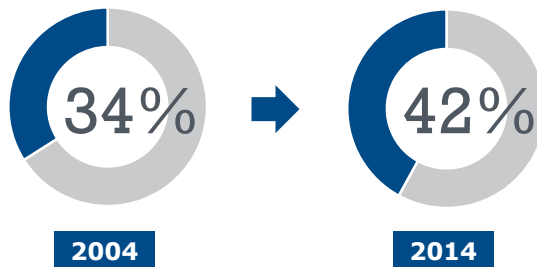


“I’ve heard anecdotal, but persistent, rumors that some non-elite **four-year schools are lowering their admissions standards to maintain their enrollments.** From a community college perspective, they’re fishing in our pond. That might explain why enrollments in our sector are dropping faster than demographics suggest they should, while enrollments in the four-years aren’t dropping at all.”

*Matt Reed, Author,  
"Confessions of a Community College Dean"*

## ...and Lowering Net Tuition

*Average Undergraduate Tuition Discount Rate at Private Universities<sup>1</sup>*



54%

Average share of sticker price covered by institutional grants for freshmen at private universities in 2014

Source: Reed M, "Fishing in Our Pond," *Inside Higher Ed*, 2015; Woodhouse K, "Discounting Grows Again," *Inside Higher Ed*, 2015; EAB interviews and analysis.

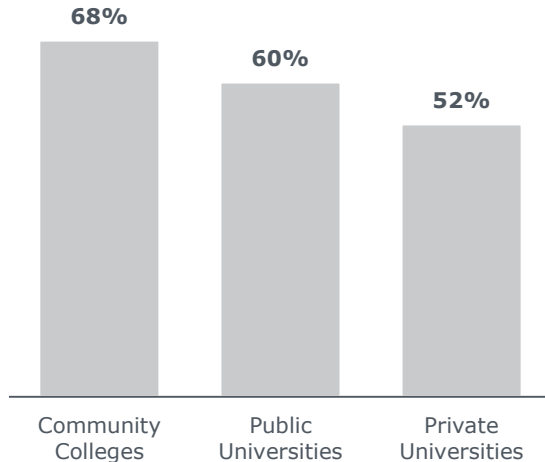
1) N=411 private institutions in 2014

# Poised for Flight to Value

## Community Colleges Entering Spotlight as Income Falls and Debt Rises

### Community Colleges Perceived as Highest Value

Percentage of Surveyed Americans Grading Each Sector a "B" or Higher for Value<sup>1</sup>



### Market Increasingly Price-Sensitive

6.5%

Decline in median household income, 2007–2014  
(\$57K to \$54K)<sup>2</sup>

362%

Increase in student loan debt, 2004–2014  
(\$260B to \$1.2T)

### Questioning the Worth of College?

31%

Percentage of Millennials in Wells Fargo survey who believe they would have been better off working than going to college<sup>3</sup>

Source: Carapezza K, "WGBH News Poll: Would You Recommend Community College Over Four-Year College," *WGBH News*, 2015; United States Census Bureau, "Historical Income Tables: Households," 2015; Barr C, "Students & Debt," *debt.org*, 2016; Wells Fargo, "More than Half of Millennials Say Debt is Their 'Biggest Financial Concern,'" According to Wells Fargo Survey," 2013; EAB interviews and analysis.

1) N=1,157 American adults

2) In 2014 dollars

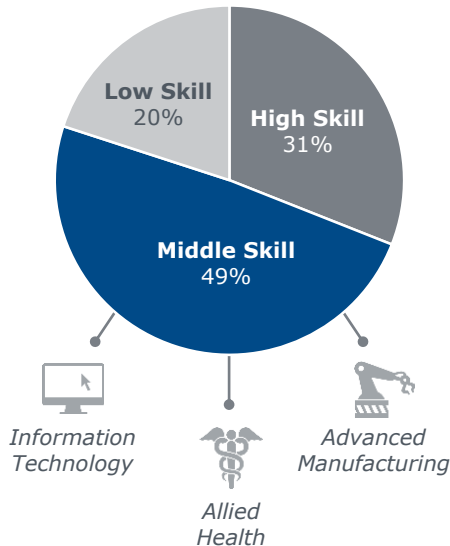
3) N=1,414 Americans aged 22–32

# A Destination for High-Return Credentials

Opportunity for Community Colleges to Grow Alongside Middle-Skill Jobs

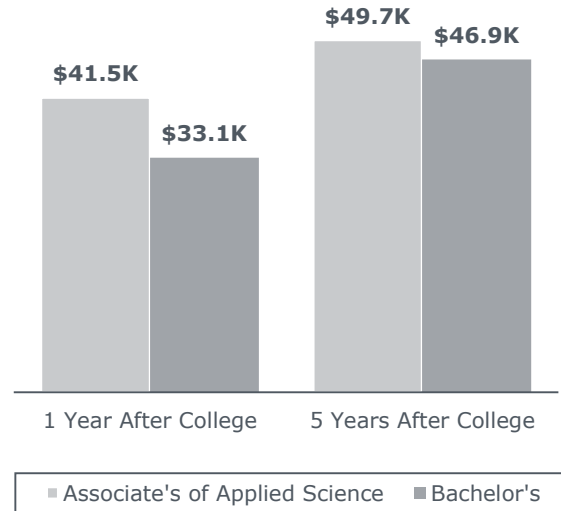
## Middle-Skill Job Openings Plentiful

*Projected Job Openings by Skill Level, 2012–22*



## A Higher Salary with a Shorter Degree

*Median Earnings in Colorado by Credential<sup>1</sup>*

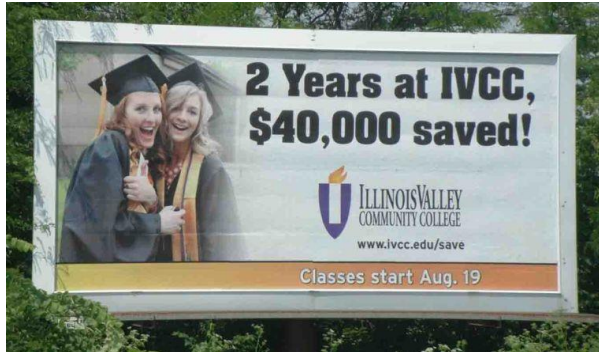


1) N=215,600 credential completers from 2002–2012 at public and private not-for-profit institutions

# Distinguishing Value from Cost

Current Marketing Message Emphasizes Low Cost But Neglects High Return

## A Classic Community College Value Story...



ILLINOIS VALLEY COMMUNITY COLLEGE.



- Two local high school graduates chose Illinois Valley Community College over universities
- Both transferred after earning associate's degree at low cost
- Now juniors—and roommates—at University of Illinois

### ...But What Made it onto the Ad?

Low cost of attendance

High transfer rates

Strong job placement outcomes

Impressive starting salaries

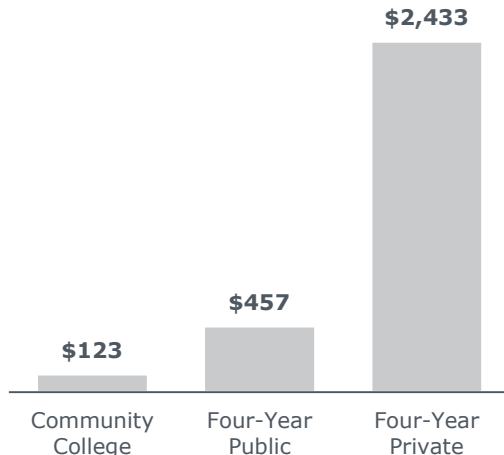


# Gap in Marketing Investments Widening

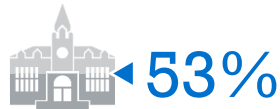
## Community Colleges Increasingly Lag Behind Universities in Recruitment

### Can't Outspend Our Competitors

Median Recruitment Expenditures per Incoming Undergraduate<sup>1</sup>



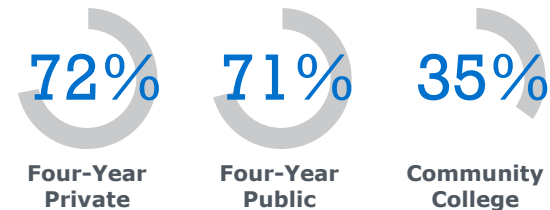
### Universities Adding Expertise...



Percentage of universities with chief marketing officers who report to president

### ...and Investing in Tech Solutions

Percentage of Institutions with CRM<sup>2</sup>



1) N=221 colleges and universities

2) Customer relationship management solution; N=263 colleges and universities

Source: Noel-Levitz, "Cost of Recruiting an Undergraduate Student," 2013; Noel-Levitz, "2013 Marketing and Student Recruitment Practices Benchmark Report," 2013; SimpsonScarborough, "Higher Ed Marketing Comes of Age," 2014; EAB interviews and analysis.

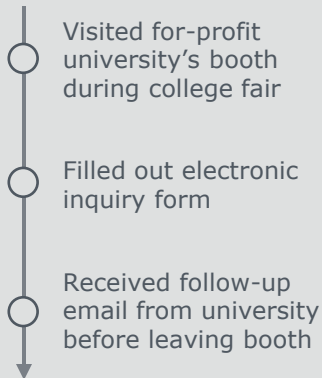
# In Need of Pre-Application Touchpoints

Competitors Prioritize Early, Frequent, and Personalized Outreach



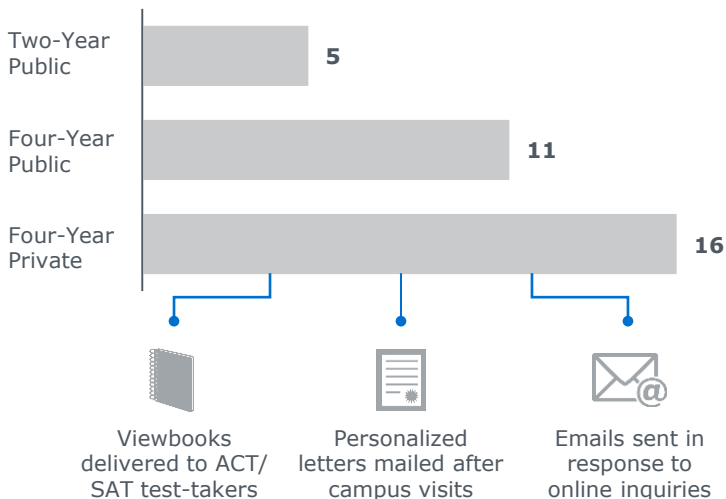
## For-Profits Setting Impossibly High Bar

*One Prospect's Story*



## Lagging Behind Public and Private Universities

*Number of Written Contacts with Prospects Before Application<sup>1</sup>*



1) N=263 colleges and universities

# Preliminary Financial Aid Estimates

## SFCC Sends Personalized Award Letters to Prospects Who Submit FAFSA



### Early Outreach to a Targeted Prospect Pool



Sends financial aid award estimates to all prospects who list SFCC on FAFSA



Calculates net cost of attendance for each prospect based on Pell eligibility



Mails letters out within one week of receiving prospect's FAFSA record



## 10K+

Number of financial aid estimates sent out per year

### Letters Highlight Low Cost of Attendance

#### *Financial Aid Estimate Letter (Simplified)*

Tuition and Fees	\$5,389
Estimated Pell Award	— \$5,645
Net Cost	<b>\$0.00</b>

#### Possible Additional Funding Sources

- State grants
- Institutional grants
- Work-study earnings
- Student loans

# Making a Competitive First Offer

## Early Financial Aid Estimates Promote Application and Matriculation



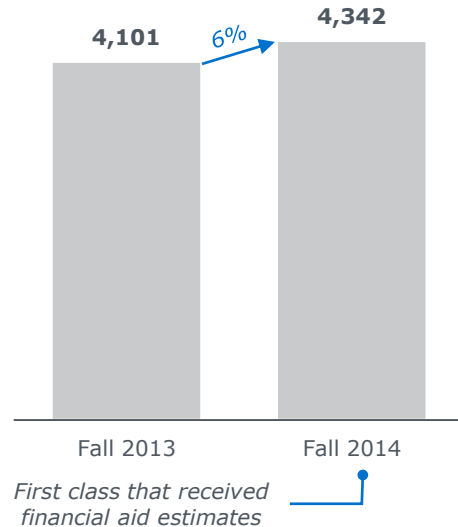
### Putting University Costs In Perspective

“When students start hearing from the four-year universities they applied to, they see that the cost of attendance is \$20,000 once they include the dorms and all the other things they might have to pay for if they leave town. **We get our preliminary letter to them first.** Hopefully their parents are looking at our letter. Then, as those other award letters come in, they have a little more perspective.”

*Marjorie Davis, Director of Financial Aid  
Spokane Falls Community College*

### Driving Enrollment Growth

*FTE at Spokane Falls Community College*

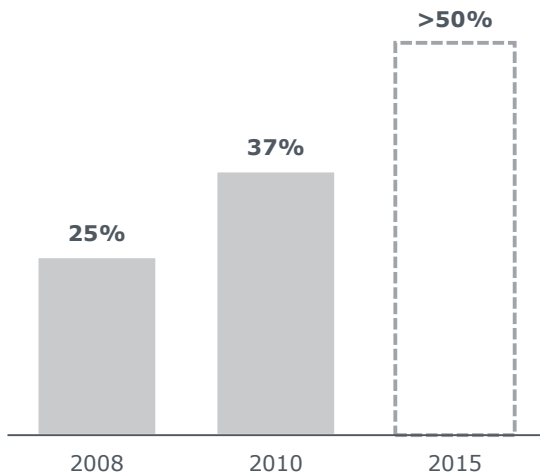


# Introducing the Stealth Prospect

## Colleges Struggle to Engage Prospects Before They Identify Themselves

### Are Applications the New Inquiry Form?

Percentage of Two-Year Students Who Make First Contact through Application<sup>1</sup>



“**Missed Opportunity to Make an Impression**

“By the time a prospective student shows up on our radar, they’re a lot further along in their decision process than they’ve been in the past. They’ve probably already made their choice. **What worries me is how many people decided to sign up somewhere else before I had a chance to talk to them.** If we want to talk to prospective students, we’re going to have to find ways to get involved earlier in their decision-making process.”

*Dean of Marketing  
Public Institution*

1) N=30 two-year public institutions

# Customized Electronic Brochure

Tri-C Offers Personalized Content in Exchange for Inquiry Submission

## Contact Information



## Academic Information

### Prospect Submits Inquiry Form

- Accessibly located on website's academic program page and footer
- Requests academic interests and student services needs
- Includes simple checkboxes and text fields for quick submission



### College Creates E-Brochure

- Auto-generated as PDF and immediately sent via email
- Customized to cover programs and services specified by prospect
- Provides fast facts and admissions contact details

### Calculating a Strong ROI

$$\text{\$10K} \div 1,459 = \text{\$6.06}$$

Amount paid to vendor

Brochures requested in 2015<sup>1</sup>

Estimated cost per lead<sup>2</sup>

1) As of mid-November

2) Based on prorated estimate of 1,650 brochures requested in 2015

# Meeting Prospects Where They Are

## Students Increasingly Seeking College Information on Digital Channels

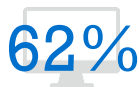
### Moving Beyond the High School Visit

“I recently attended a statewide admission directors’ meeting to discuss the allocation of resources. A lot of the colleges were saying that they’re seriously considering stopping high school visits. **The younger generation does not want to talk to you face-to-face anymore.** Perhaps something completely digital would be a good alternative.”

*Marlene Barlow  
Director of Admissions, Bucks County  
Community College*

### A Diverse Range of Online Resources

62%



Percentage of high school seniors who prefer to read about colleges online vs. in print materials<sup>1</sup>

67%



Percentage of high school seniors who have researched colleges through Facebook<sup>2</sup>

43%



Percentage of high school juniors who have clicked on a paid interactive ad from a college<sup>1</sup>

1) N=3,000+ high school juniors and seniors

2) N=1,611 high school seniors

# Mobile Geofencing Ads

## NCC Promotes Training to Job Seekers Located Near Sponsoring Employer

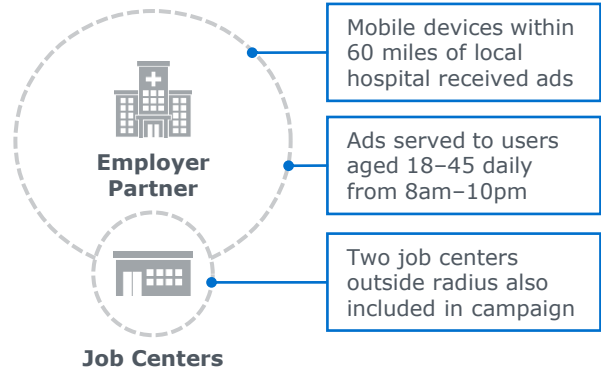
### A New Way to Deliver Ads



**Geofencing:** Creating a virtual barrier around a location to serve ads to devices within it

- Promoted Certified Nurse Aide program through 4-week geofencing campaign
- Partnered with advertising vendor UpSnap to serve ads on 50+ popular mobile apps and websites

### Precise Targeting Yields More Leads



### High Return on a Low Investment

*Outcomes from \$1,200 Ad Campaign*

**1,700**

Click-throughs generated

**31**

Prospects at info session

**15**

Students enrolled in training

**\$8,925**

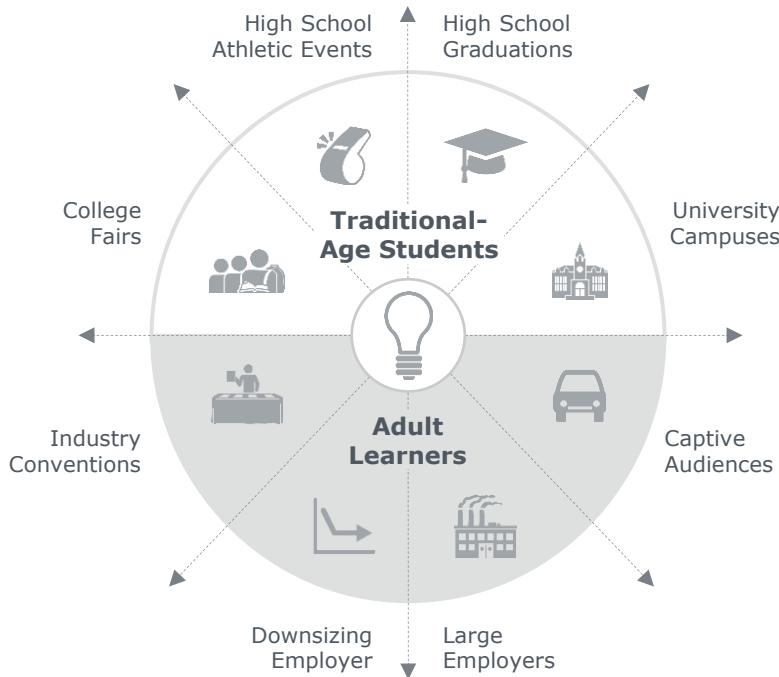
Tuition revenue earned





# An Endlessly Versatile Solution

## Brainstorming Creative Uses for Geofencing in College Marketing



### Home for the Summer?

Advertise summer or winter courses to students enrolled at local universities

### Bored at the DMV?

Target locations where people occupy themselves with their phones while waiting in line

# The Shifting Enrollment Landscape

## A Four-Part Webinar Series

1

### Developing a Student Recruitment Strategy

*Today's session*

An overview of how today's community colleges can adapt to unprecedented enrollment pressures



2

### Strengthening Applicant Outreach

*Tuesday, August 9  
1-2pm ET*

Strategies to build a pipeline of college-ready applicants and help them navigate the enrollment process



3

### Elevating Prospective Student Engagement

*Fall 2016  
(exact date TBD)*

Practices to engage prospects—including stealth applicants—early in the college decision process



4

### Emerging Practices in Digital Marketing

*Fall 2016  
(exact date TBD)*

Tactics that leverage online advertising and social media to reach today's prospects where they are

