



Strengthening Applicant Outreach

The Shifting Enrollment Landscape, Part 2

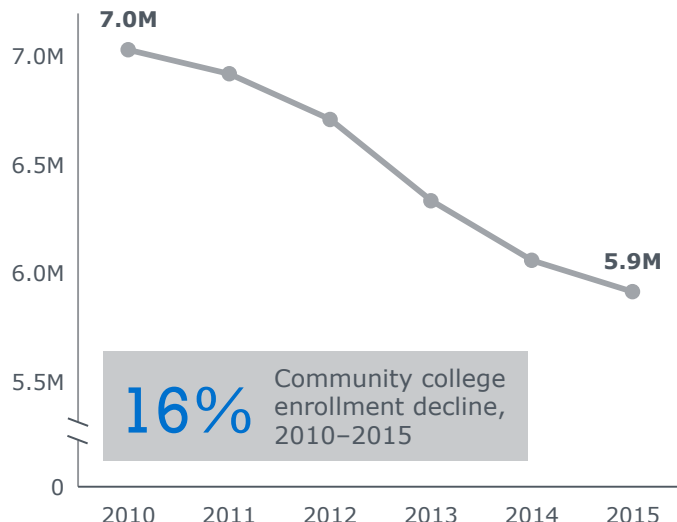
Community College Executive Forum

Growing Pressure to Recover Enrollments

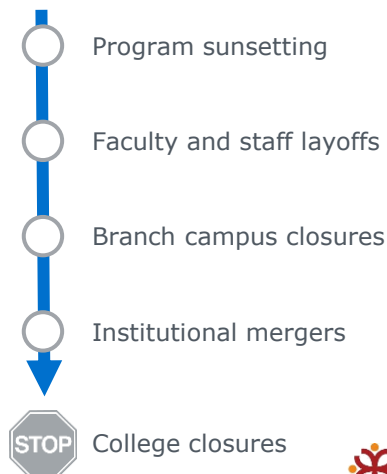
Persistent Loss of Tuition Revenue Destabilizes College Budgets

Five Years of Enrollment Declines

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



Amid Funding Volatility, No Easy Costs Left to Cut



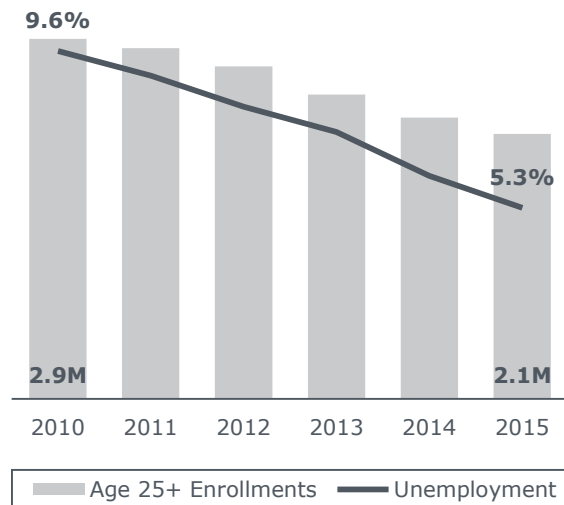
Source: National Student Clearinghouse, "Current Term Enrollment Estimates," 2015; National Student Clearinghouse, "Current Term Enrollment Estimates," 2012; Smith A, "Mergers without Rancor?" *Inside Higher Ed*, 2015; Smith A, "Too Few Students," *Inside Higher Ed*, 2015; EAB interviews and analysis.

Facing Headwinds from Both Sides

Economic and Demographic Trends Hold Down College Enrollments

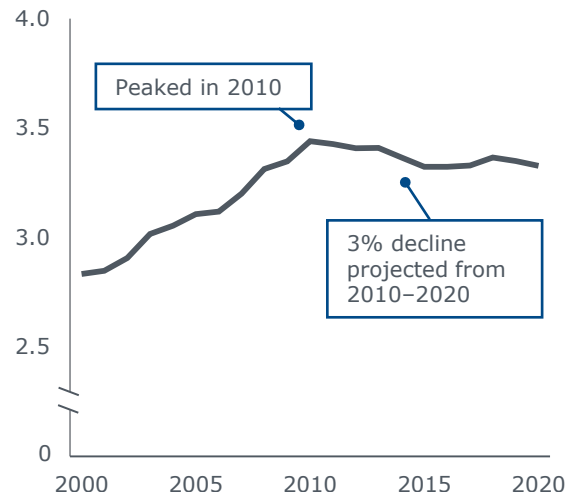
Adult Learners Returning to Workforce

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)¹



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

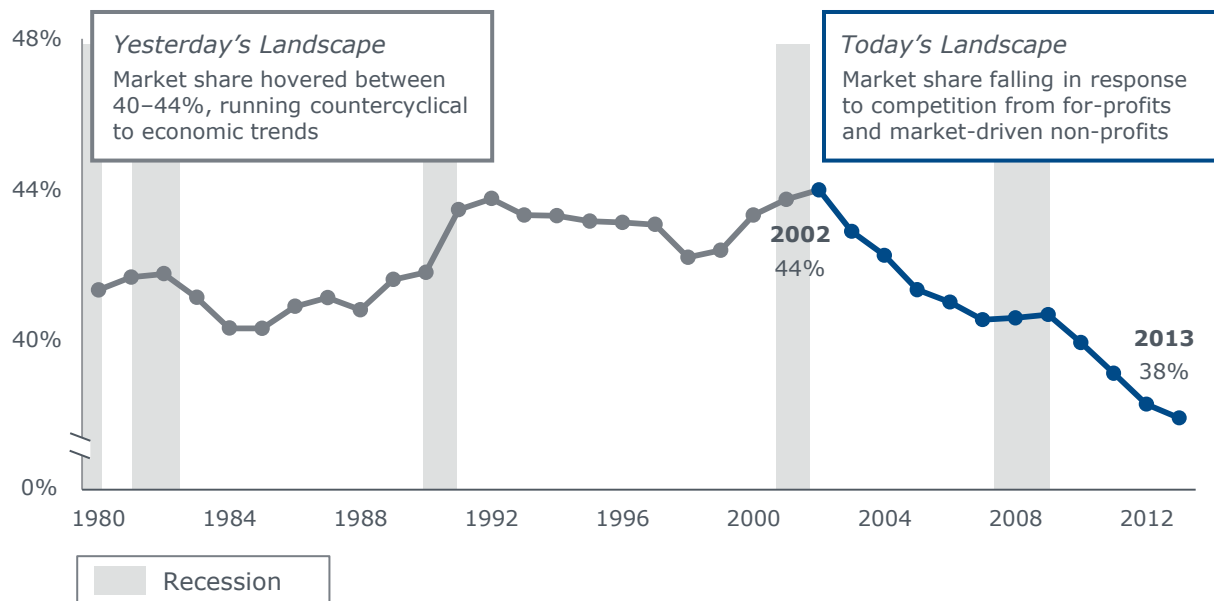
Not Just a Cyclical Trend



Community Colleges Losing Market Share Irrespective of Economy

Share of Total Enrollments in Decline Since 2002

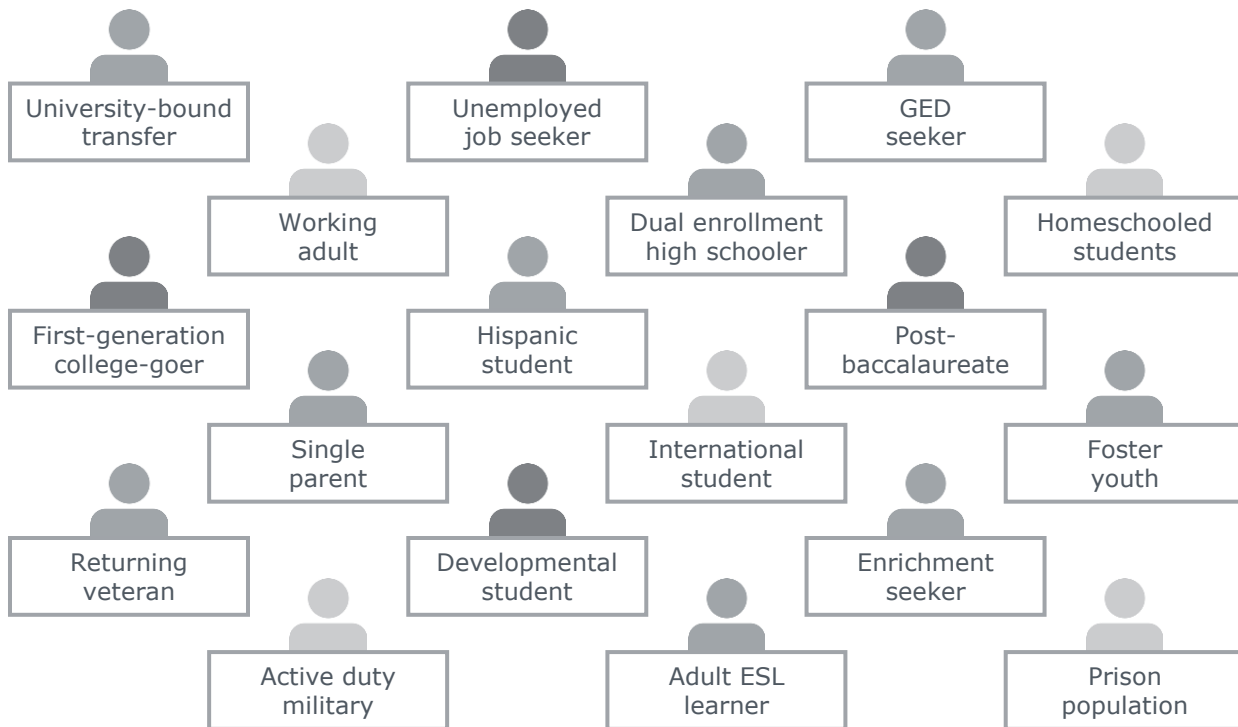
Percentage of U.S. Undergraduates Enrolled in Two-Year Sector, 1980–2013



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



Recruitment Promotes Specific 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.’

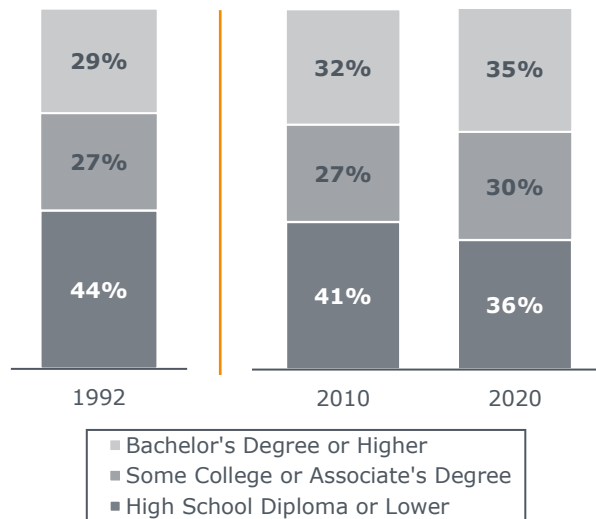
Ross Miyashiro, Vice President of Student Services, Coastline Community College

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 Education¹



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.

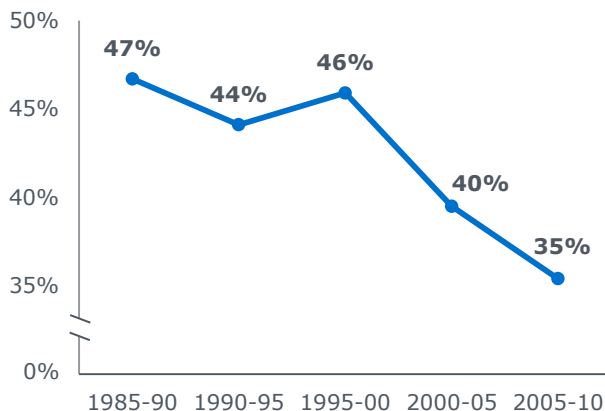
1) Data for 2020 is projected

The Growing Power of Local

Relying on Community Colleges as Geographic Mobility Declines

Staying Closer to Home

U.S. Five-Year Mover Rate Since 1985¹



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



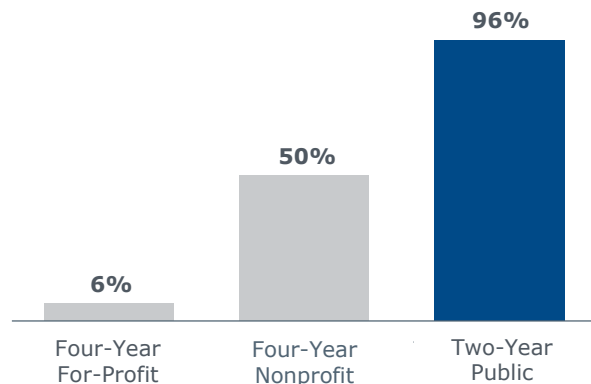
1) Percentage of Americans age 5+ who moved homes across five-year period

In Need of College Navigation Skills

Current High School Partnerships Missing Target Audience

Community Colleges Out-Partner Peers

Percent of Institutions Offering Dual Enrollment



Annual cost of community college dual enrollment programs

Few Dual Enrollment Students Matriculate After Graduation

8%

Estimated percent of students who attend community college

80%

Estimated percent of students who attend university

“We have a rich history of partnering with local school districts, but I have a sense that **the students we serve through our high school programs aren't the ones showing up at our doors.** With enrollment shortfalls it's time to revisit that K-12 strategy.”

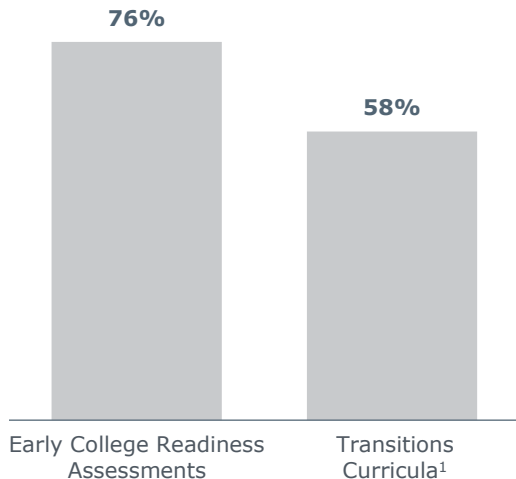
*Dr. Sylvia Jenkins, President,
Moraine Valley Community College*

Lack of Attention to Non-Academic Barriers

College Navigation Poses Greater Obstacle than Coursework

Academic Interventions Abound...

Percent of States with Early Testing and Transition Programs



...Yet Greatest Barriers Non-Cognitive

Top Transition Barriers Cited in EAB Survey of College Administrators²

- 1 Unable to finance education
- 2 Coursework disconnected from career goals
- 3 Lacking college support network

“I had so many little questions about going to college. **How do I pay my tuition? What does MWF mean?** I asked my mom, but she didn't know—never went to college. I was on my own.

First-Generation Community College Student

1) Academic programming that targets students at risk of requiring developmental coursework

2) N=300

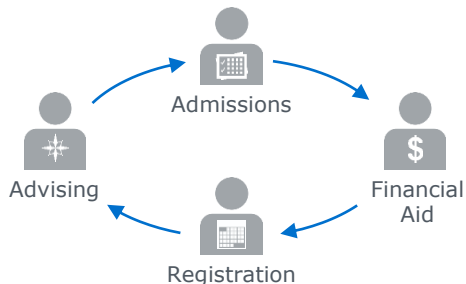
One-Stop Enrollment Caravan

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



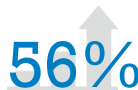
15K

Students participating annually across 25 school districts



\$16

Average cost per student



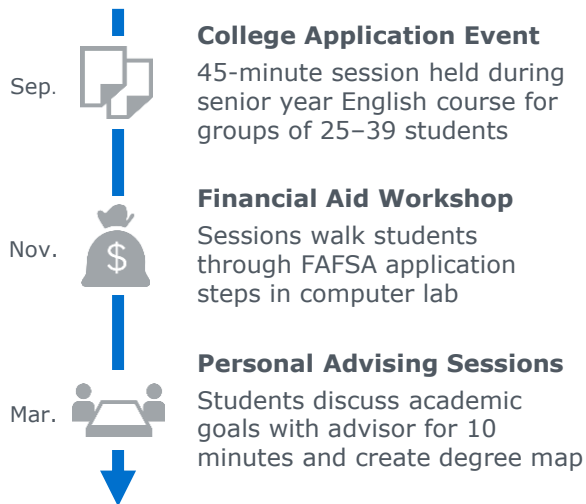
56%

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

Maximizing Our High School Partnerships

Research on Promoting College Readiness Available in EAB Library

Bolster the Recruitment Pipeline



Digital and
hard copies



On-demand
webinars



Applicable
toolkits

Breakthrough Practices

- ☒ On-Demand Summer Helpline
- ☒ Prospective Parent Listserv
- ☒ College Transition Mentors

Making it Work on Your Campus

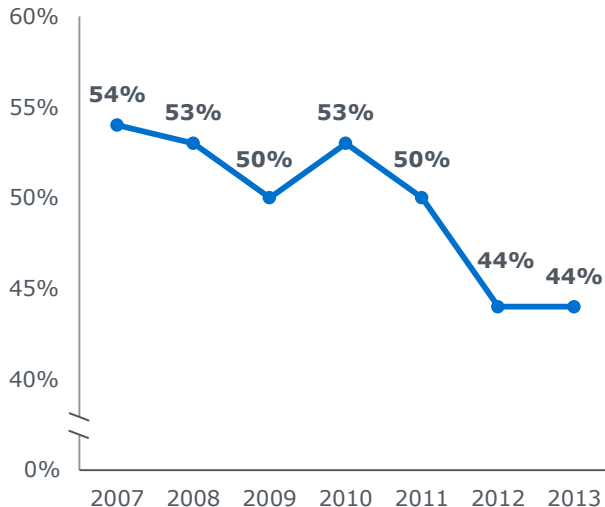
- ☒ Program Interest Online Survey Guide
- ☒ Mentor-Mentee Communication Timeline
- ☒ Speed Networking Conversation Prompts

Losing Students Before Classes Start

Applicant Conversion Rates Declining Absent Guidance from College

Students Slipping Through Our Fingers

Community College Applicant Conversion Rates¹



Cannot Afford a Hands-Off Approach

“Many of the student services operations where we’re seeing very low conversions have very little communication. They say, ‘**Here’s your ID number—good luck!**’ Everything is on the student, but the students we see today need constant reminders.”

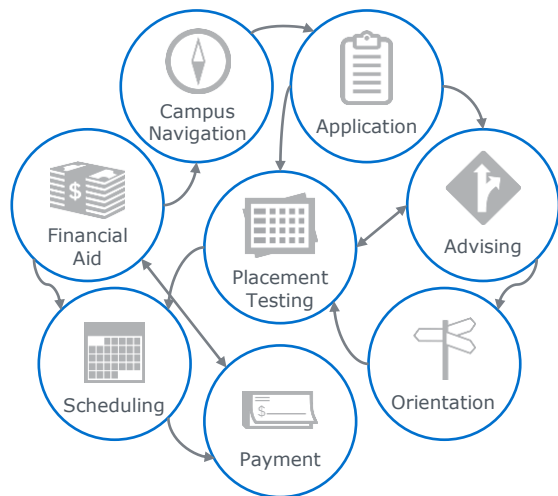
*Kathi Swanson, President
Clarus Corporation*

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

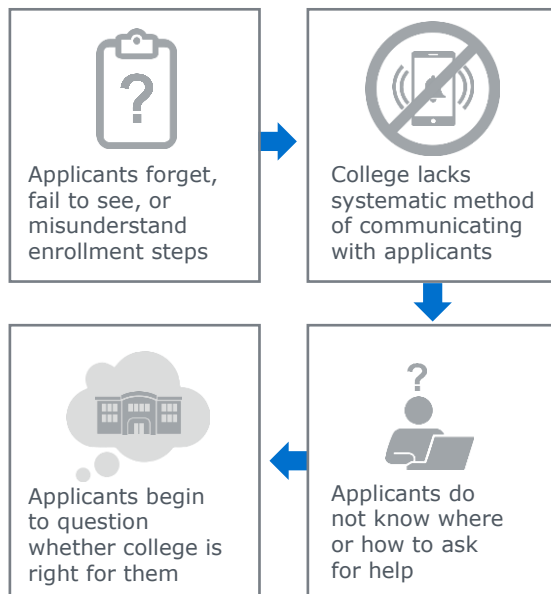
From the Applicant's Perspective

Incoming Students Overwhelmed by Complex Enrollment Process

Confronted with a Maze of Steps



Without Answers, Applicants Abandon Enrollment

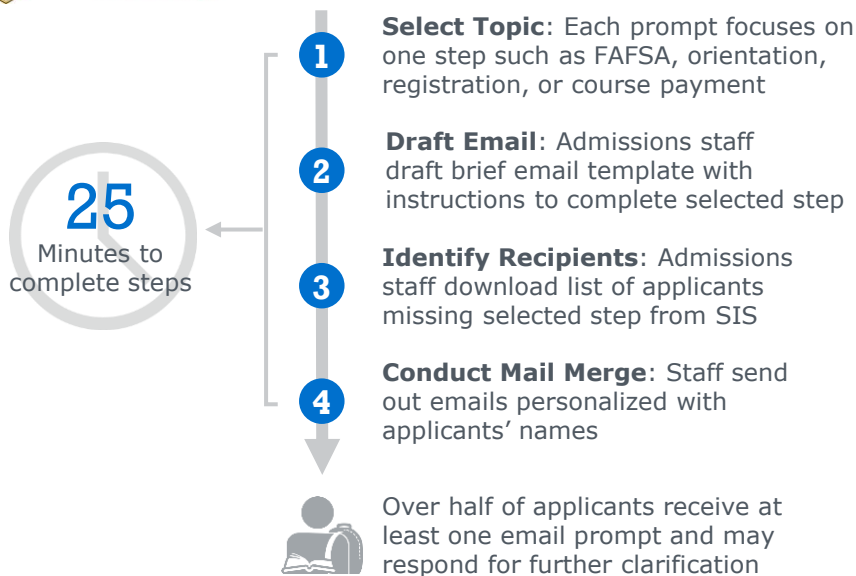


Missing Step Enrollment Prompts

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 year¹

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

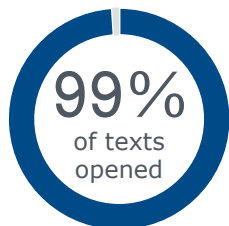


Reaching the Smartphone Generation

High School Students Increasingly Receptive to Texts from Colleges

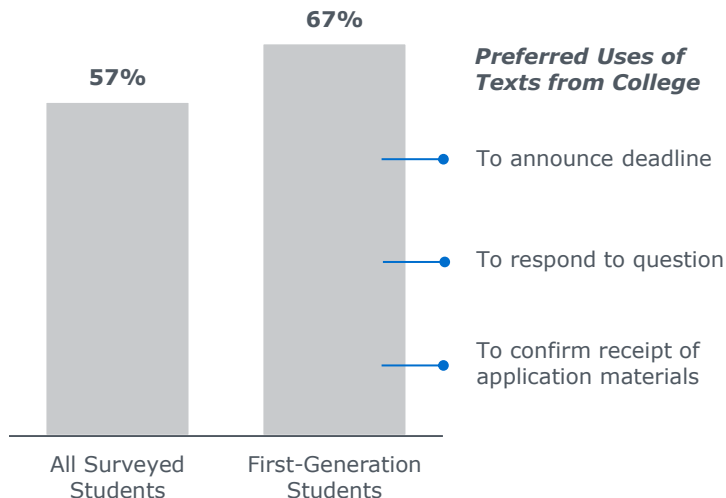
Hard Messages to Ignore

Average Open Rates by Channel



Texts from Colleges Welcome— Especially Among First-Generation Students

Percentage of High Schoolers Open to Texts from Colleges¹

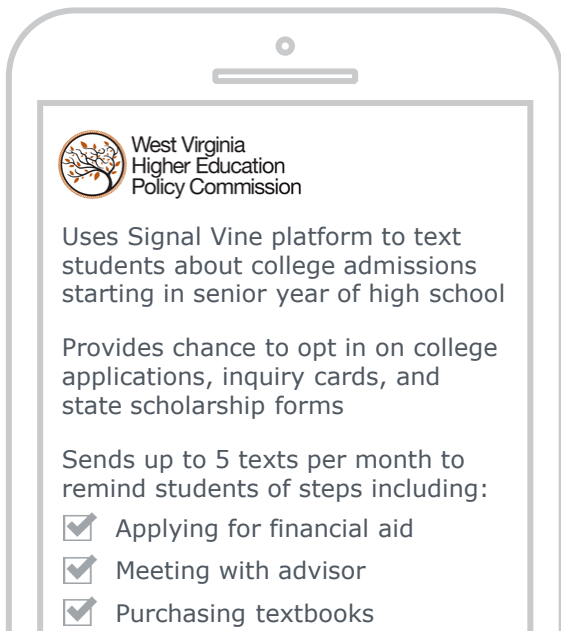


1) n=8,515 college-bound high school students

A Text Message Alternative

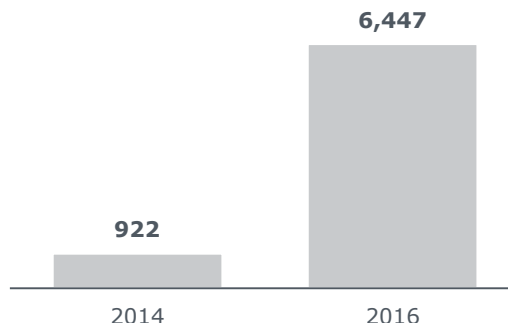
West Virginia Reminds College-Bound Students of Approaching Deadlines

A Statewide College Outreach Effort



Rapid Expansion of Pilot Initiative

Number of Students Opting Into HEPC Texts



86%

u^{aspire}



Percentage of high school graduates in separate uAspire study reporting that texts prompted them to complete unfinished college enrollment tasks¹

1) N=2,200 recent high school graduates

Uncovering Barriers to Enrollment

Applicants Hesitate to Seek Help with Removable Hurdles



From Telling to Asking

“We were doing a good job at customer service in terms of reminding the student, ‘You need to fill out this form, and you need to fill out that form.’ But **we weren’t finding out why the student wasn’t filling out those forms**—what might have changed in their lives since they started applying, and what might be causing delays in taking the next step in the admissions process.”

*Marketing Director,
Community College (Midwest)*

Identifying Leaks in the Pipeline

Common Enrollment Challenges for Applicants



Needs assistance understanding highly technical FAFSA questions



Confused by academic jargon in course catalog and registration portal



Unable to book advisor meetings that fit into work schedule



Unaware of available resources, such as child care and transportation

Non-Registrant Phone Survey

Glendale Addresses Barriers to Enrollment Before Classes Start



What Prevents Our Applicants from Registering?



Surveys non-registering applicants to uncover why they do not enroll



Hires call center to conduct survey two weeks before classes start for \$3,500



Provides call center with 4-question script; last question asks if applicants need assistance from college staff

Converting Lost Applicants



621 Applicants contacted



121 Applicants enrolled

\$111K Estimated tuition revenue generated¹

Developing an In-House Alternative



- Summer phone bank staffed by 1 supervisor and 5 part-time call agents
- 4-hour training teaches agents to answer FAQs and refer applicants to relevant services
- In-house solution provides applicants with personal touchpoints from college personnel

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

Is College Right for Me?

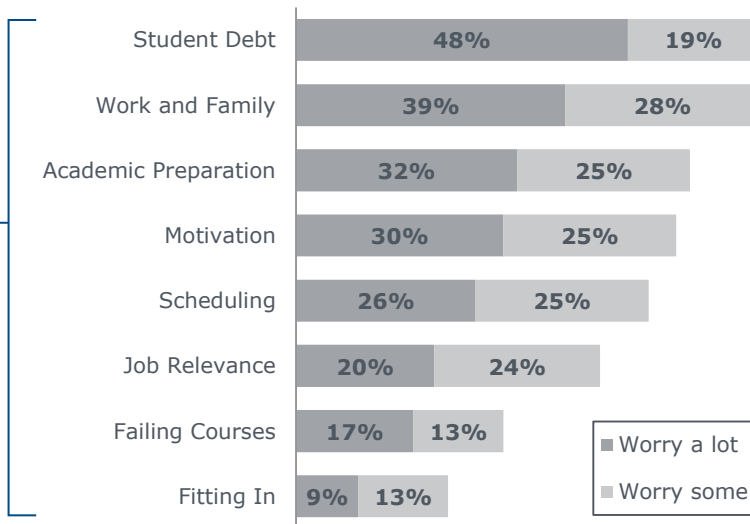
Concerns About Returning to School Common Among Adult Learners

Two Types of Non-Registering Adult Learners



Finances, Academics, and Competing Commitments

Percentage of Adult Learners Reporting Common Anxieties¹



1) N=803 prospective adult learners

Pre-Enrollment Success Course

Hocking Offers Free Student Success Class to Reduce College Anxiety



Facilitating and Incentivizing Enrollment



Free 8-week course covers key enrollment steps and student success skills



Guest speakers teach content drawn from existing student success course and workshops



Staff promoted course to prospects age 25+ who applied but did not register for current term



Course completers earn 1 credit, plus scholarship for additional 3-credit course in next semester

Course Components

- ☒ Campus tour
- ☒ Overview of student resources
- ☒ FAFSA workshop
- ☒ Introduction to Accuplacer
- ☒ Math skills tutorial
- ☒ Study skills review
- ☒ Course audit

100%

Percentage of free course completers who enrolled in the subsequent term¹

\$12K

Tuition revenue generated by free course completers

1) 88% of course completers enrolled full-time;
12% enrolled part-time

Increasing Applicant Conversion

Key Lessons for Implementation on Your Campus



Quick Wins

- 1** Send brief call-to-action messages to remind applicants about missing enrollment steps
- 2** Communicate with applicants through their preferred channels, such as text messaging
- 3** Survey non-registering applicants to identify and remove enrollment barriers before classes start
- 4** Offer student success courses before applicants enroll to help them overcome college anxiety

Long-Term Differentiators

The Shifting Enrollment Landscape

A Four-Part Webinar Series

1

Developing a Student Recruitment Strategy

*Archived at
eab.com*

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



2

Strengthening Applicant Outreach

*Today's
session*

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



3

Elevating Prospective Student Engagement

*TBD
1pm*

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



4

Emerging Practices in Digital Marketing

*TBD
1pm*

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



Providing More Support for Your Team

Contact Information and Upcoming EAB Resources

CCEF Enrollment Expertise

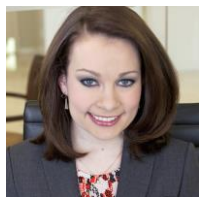


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Additional Research and Membership Questions



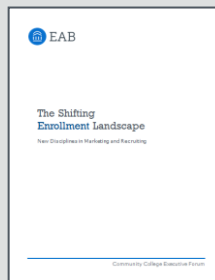
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The Shifting Enrollment Landscape

Available Sept. 9th on eab.com



Provides comprehensive explanation of recruitment strategies



Includes toolkit to help implement best practices on your campus