

Developing an Enrollment Management Model at Indiana University South Bend

Observations and Recommendations

Prepared by

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INTRODUCTION

At the request of Chancellor Uma Mae Reck, I visited Indiana University South Bend on October 26-28, to provide consultation on the formation of an enrollment management committee, and the development of an enrollment management model at IU South Bend.

During my visit I had individual meetings with Chancellor Mae Reck, Vice Chancellor for Academic Affairs Alfred Guillaume, Vice Chancellor for Public Affairs and University Advancement Ilene Sheffer, Senior Associate Vice Chancellor for Student Affairs Jackie Caul, Assistant Vice Chancellor for Academic Affairs Karen White, Associate Dean Lynn Williams of the College of Liberal Arts and Sciences, Chairperson of the Campus Directions Committee Eileen Bender, Registrar Mike Carroll, Director of Admissions Jeff Johnston, and Director of Financial Aid Beverly Cooper. I shared meals and discussions with Dean Miriam Shillingsburg of the College of Liberal Arts and Sciences, Clinical Assistant Professor of Nursing Marta Makielski, Vice Chancellor for Administrative and Fiscal Affairs MaryAnn Zemke, Director of Budget Planning and Accounting Services Donna Broadstreet, and Acting Director for Information Technology Beverly Church. Carl DeBruyn served as my tour guide on an informative and enjoyable campus tour.

In group settings, I met with the full Enrollment Management Advisory Committee and several members of the Academic Cabinet.

In addition to these discussions, I conducted informative e-mail exchanges with a number of IU South Bend administrators. I reviewed the IU South Bend web site, a set of admission publications, financial aid publications, student academic support center publications, and a variety of data summaries and reports. These included: *Campus Changes to Demographic Projections Enrollment Study*, and the *Official Undergraduate Retention Report* from Indiana University Budget Office, the *Unofficial Enrollment Reports* of the IU South Bend Office of the Registrar plus additional data produced by the Registrar, and Office of Admissions reports on recruitment, competitor institutions, and communication efforts. I found all of these very helpful, as I did the *Lilly Student Success Grant Final Report*, the conference proceedings of *A Retrospective of Innovation: Keeping Indiana Students in College Through Retention Initiatives*, and the report on administrative structure by Dr. Alice Chandler. I also read the text of the Chancellor's Remarks for the All-Campus Meetings, selected issues of the newsletter produced by Vice Chancellor Guillaume, the text of his Senate speech of October 17, 2003, the Chancellor's Report, *The Year in Review*, 2002-03, and sections of *Foundations* and the student newspaper.

I would like to thank all of the individuals I met for their hospitality and candor, and for the interest they show in the future of Indiana University South Bend.

Developing an Enrollment Management Model at Indiana University Southeast

1. GENERAL OBSERVATIONS ABOUT ENROLLMENT ISSUES AT INDIANA UNIVERSITY SOUTH BEND

Why should Indiana University South Bend undertake a programmatic approach to enrollment management at this time?

There is no immediate serious problem –such as a significant downturn in enrollment – that threatens the University. Relevant data indicate that IU South Bend strengths include: location; quality education (to include quality teaching); cost; choice of academic programs; and a supportive environment. The institution is proud of its students. The relationship with the community is solid. The prestige of affiliation with Indiana University is a compelling factor in the overall reputation of Indiana University South Bend. The faculty is uniformly praised for a commitment to teaching and the pursuit of academic excellence.

At the same time, IU South Bend must recognize existing and potential challenges to achievement of an optimal enrollment situation. A look at the last ten years of Indiana University South Bend enrollment history shows fluctuations, sometimes significant, in both Headcount and FTE enrollment. Such fluctuations prevent an institution from establishing confidence in a predictable enrollment scenario, whether stability or growth. And, to address interest in a more selective admission process, especially for traditional age students, a recruiting program targeting differentiated segments of the prospective applicant pool will be necessary.

In a practical sense, a programmatic approach to enrollment management can help the institution avoid surprise developments that have a negative impact on both budget and educational initiatives. At the same time, however, an effective enrollment management effort will help Indiana University South Bend continue to fulfill its broad institutional mission while it embraces an ambitious vision of an exciting future.

2. CAMPUS-WIDE ISSUES FOR THE ENROLLMENT MANAGEMENT COMMITTEE

2.1 Definition of Enrollment Management

Observation

The campus has clearly heard the message that a new, or renewed, enrollment management effort is important and necessary at Indiana University South Bend. Several times during my interviews, I heard references to the Chancellor’s recent description of enrollment management as “everyone’s job.” Enrollment management is not an unfamiliar topic on campus. All of the individuals I met with were willing, and even excited, to discuss such an effort. I did not perceive any overtly negative reaction to the concept of enrollment management. However, as with most efforts to establish enrollment management as a cross-functional mission, there are likely to be varied

perspectives on what enrollment management *is*, and why it is being *formalized*. Developing a uniform understanding of the concept, and an appreciation of the enrollment agenda, will be necessary for the committee to function efficiently and achieve its goals.

Recommendations

It will be beneficial to the overall enterprise to provide the campus community, early in the process, with an unambiguous working definition of enrollment management. The definition would be used to inform the activities of the Enrollment Management Committee, and would be shared with the campus community. The Enrollment Management Committee can choose a definition from the literature, or draft a definition unique to the situation at Indiana University South Bend. There are a number of very good definitions available in the literature that might be used to center committee endeavors.

Enrollment management is the coordination of the functions that directly affect the recruitment, admission, financial decisions, and retention of the students the school most wants to serve. Managing enrollment includes: (1) the analysis of factors influencing enrollment (including what attracts students and why they leave); (2) the establishment of a good student-institution match in recruiting and admission; (3) an orientation that facilitates the students' transition into the university; (4) adequate advising and counseling; (5) an attitude of service to students; and (6) promotion of an overall responsive environment. ¹

Another definition expands the range to include forecasting.

Enrollment management assesses the policies and practices that impact all areas of recruitment and retention, anticipates changes that are likely to affect, and/or occur in, higher education, and persuasively articulates to the campus community the need for change within the institution. ²

The simplest definition is less administratively complex but goes to the essence of enrollment management objectives.

Enrollment management is the recruitment and retention of the satisfied alumnus-to-be.

2.2 Communication About Enrollment Management

Observation

Communication is always important on a college campus, especially when signaling senior level support for an endeavor, or explaining the activities of a committee. Both will be true in the case of establishing the Enrollment Management Committee, and communication will need to be unambiguous and transparent. Furthermore, clear and consistent communication will be useful in reinforcing the message that managing the enrollment is "everybody's business."

Recommendations

I would suggest three measures to promote constructive communication.

- Draft a short position paper that addresses the purpose and goals of the committee. This paper should provide a definition of enrollment management, describe the committee,

reassure the campus community that this is a proactive effort, not an emergency response to a perceived threat, and provide a general timeline for activities. This short paper should be distributed directly to key members of the campus community, and could be posted on the web site for broader dissemination. As Chairperson of the committee, the Chancellor should author the paper, as a reminder to faculty of her commitment to open communication and sustained interaction, as a symbol of her commitment to the success of the committee, and as an underpinning for the authority of the committee.

- Establish a timeline for periodic updates. For example, a quarterly update, in the form of a simple newsletter, can keep the campus informed about goals, projects, and assessment. The update can be in print and/or web-based. It need not be lengthy, but it should be presented on a regular basis.
- Market the effort internally as well as externally. The goals of enrollment management should be included in the development of Marketing initiatives whenever appropriate, and mentioned as an important activity of the campus. The goals of enrollment management can be reinforced, both indirectly and directly, through internal memos, in on-line newsletters, and in publications directed to interested audiences, such as the alumni.

All communication efforts should reflect a blend of statistics and stories. If communication is limited to data alone, the perception will be that the committee is concerned only with enrollment *numbers*. The effectiveness of communication will be increased if attention is given to a balanced combination of *data* (such as enrollment profiles), *emotion* (such as the need to manage a response to demographic and educational trends to maintain the overall organizational health of the institution), and *symbols* (the outstanding campus individuals and the “points of pride” Indiana University South Bend can highlight time and again).

Emphasize pride in the change of direction and the broadening of goals.

2.3 Campus Directions Committee

Observation

The campus strategic plan being developed by the Campus Directions Committee will ultimately provide a framework for a wide range of initiatives at Indiana University South Bend. It reflects the broad involvement of faculty. Institutional achievements and initiatives are already being described in terms of their affinity to the six priorities, as depicted in the *Chancellor’s Report, 2002-03, The Year in Review*. There is, as well, the clear connection between the strategic plan and the accreditation process.

However, while the Campus Directions Committee has been commendably thorough and inclusive in its process, and has weathered volatile campus changes, its timeline does not accommodate the need for an action-oriented, operational initiative that will require extensive involvement of staff as well as faculty. It also remains to be seen how the new Indiana University President will react to the Campus Directions Committee and campus strategic plan.

Recommendation

The Enrollment Management Committee, and the Strategic Enrollment Management Plan that should result from committee actions, must be presented as an *operational manifestation* of the

campus priorities. The priorities are sufficiently broad in nature that essentially all enrollment activities can be developed in harmony with those priorities.

3. OPERATIONAL ISSUES OF THE ENROLLMENT MANAGEMENT COMMITTEE

Observation

The Enrollment Management Committee needs to become the cornerstone component of the enrollment management campaign on campus. As such, it must operate as both an efficient, action-oriented group *and* a forum. In operational terms, the committee members must be seen as receptive to campus input, while the committee, as a campus entity, must be seen as having a clear agenda and progressing toward a set of achievable goals.

Recommendations

1. Agree to a definition of enrollment management and to goals for the enrollment committee (not to be confused with specific enrollment goals).
2. Establish *action teams* and *enrollment champions*. The committee is too large for the entire group to tackle everything at once. The committee can be divided into working groups (called sub-groups or sub-committees if necessary). The Chancellor, as Chairperson, should charge the working groups, provide oversight and react to working group activities and reports.

There should be at least two working groups – Recruitment and Retention – but I would suggest three: Recruitment, Retention, and Service (or Managing Expectations). The *Recruitment* working group would concentrate on recruitment, admissions, financial aid, orientation and related areas. The *Retention* working group might focus on advising, counseling, academic support and co-curricular initiatives. The third group – the *Managing Expectations*, or *Service*, working group – would have a more flexible agenda. This flexibility will allow the members to tackle a variety of tasks that do not readily fit under *Recruitment* or *Retention*; these might include the ability to identify and endorse service initiatives, to promote a *culture of service* on campus, to articulate the committee’s mission internally, and to present and discuss issues such as the changing nature of contemporary students and the mix of generations on campus. (See Pilot Project #2.) The *Service* working group could oversee the quarterly update.

The leaders of the respective groups would organize action within their teams and report to the full committee.

Ideally, the research agenda should feed all three working groups.

3. As a coordinating mechanism and as a way to focus activities, draft a *Strategic Enrollment Management Plan*. Ultimately, the written plan will help establish committee authority on campus, articulate enrollment goals, and direct committee projects. Of equal importance, the process of writing the plan itself will help regulate committee activities within a logical framework. The writing will force critical thinking about the process, the plan will provide a blueprint for committee action, and the result will be a document for the campus to see and to which they can relate.

The *Strategic Enrollment Management Plan* can take a number of forms. But, at a minimum, it should include the following.

- Definition of Enrollment Management
- Charge to the Enrollment Management Committee
- Situation Analysis (to include a SWOT Chart)
- Research Agenda
- Enrollment Goals (to include a Discussion of *Enrollment Mix*)
- Strategies for Admissions Marketing and Recruitment
 - Recruitment of Traditional Age Students
 - Recruitment of Non-Traditional Students
- Strategies for Retention
 - Academic Advising
 - Academic Support Services
- Assessment Plan for Measuring Success

4. Establish an ongoing ambitious research agenda. Some of the research should become part of the planning document, but research results also provide direction for broader campus discussions and input for innovation in various areas of campus life.

- Conduct a data inventory to determine what reliable data exists, which offices possess the data, and how relevant data might be shared among committee members. There appears to be a sizeable body of data already collected with which to begin the enrollment management discussion.

Identify current reports and data formats that are likely to remain in use throughout the enrollment management reviews and analysis, and which will therefore provide consistency for comparison. For example, the *Official Undergraduate Retention Report* of the Indiana University Budget Office, the “*Unofficial Enrollment Reports*” of the IU South Bend Registrar’s Office, Admission Office *Application and Admission Reports*, and the Indiana University “*Enrollment Study*” of *Demographic Projections* are expected to be ongoing useful sources of enrollment data with formats that will be unchanged.

Other studies, such as those associated with the Lilly Grant Retention Project, provide valuable data and information, but are not likely to be repeated in the same format.

Many other reports are compiled on an occasional basis, as dictated by administrative need or routine.

- Once the sources of data are inventoried, the various reports, as well as raw data, should be assembled in one department or area for appropriate access. The office of the new Director of Institutional Research may be an excellent location.
- Conduct a series of surveys to assess all relevant constituencies. There is great value in maintaining as much consistency as possible between the survey instruments. If no particular preference is present on campus, I recommend a set from the *American College Testing Program Postsecondary Survey* series. This series allows the institution to develop up to 30 customized questions to add to the sections on the survey, so that particular issues can be targeted. The format is consistent, ACT processes the survey forms in a timely manner, and normative data reports for each category can be purchased along with the results of the institutional surveys. I recommend, at a minimum, the following four

categories, with all four surveys conducted the first year to establish benchmark data, then surveys staggered in subsequent years: two one year, the other two the next year, and so on.

Adult Learner Needs Assessment Survey

Explores the perceived educational and personal needs of adult students.

Student Opinion Survey

Explores enrolled students' satisfaction with programs, services, and her aspects of their college experience.

Entering Student Survey

Provides a variety of demographic, background and educational information about entering students.

Withdrawing/Nonreturning Student Survey

Helps determine why students leave college before completing a degree or other program.

Other survey categories that would be useful are the *Survey of Academic Advising*, and *Survey of Postsecondary Plans* (for students still in high school). Information can be obtained at www.act.org.

5. Address issues of professional development and training with regard to enrollment management.

4. GENERAL OBSERVATIONS REGARDING IU SOUTH BEND STRENGTHS AND CHALLENGES RELATED TO ENROLLMENT

The following observations seek to articulate IU South Bend strengths and challenges related to enrollment. I believe that many, if not all, of these observations can be appropriate topics for the Enrollment Management Committee to incorporate into its agenda. I am not suggesting a priority sequence by the order I am using here. The committee should establish the priority of these matters. I have included in these observations a number of questions. They are intended to suggest agenda topics for the committee to pursue, in brainstorming sessions and as part of working group activity.

Enrollment Mix

- The “enrollment mix” at IU South Bend will be a significant first factor to study. An analysis of the current mix, in conjunction with a profile of the *desired* mix, will help with the development of specific enrollment goals.

The enrollment mix concept looks at how enrollment is distributed across various categories within the institution, such as freshmen and transfers, full-time and part-time, high achieving, standard and at-risk students, undergraduates and graduate students, traditional age students and non-traditional students, and cohort size, from freshman to senior years. Other categories, such as the minority enrollment, can be added based on institutional interest and planning.

Below is the enrollment mix for Fall Term, 2003. How does this mix look compared to past years? Are changes in the mix legitimate trends or situational fluctuations? Are there trends IU South Bend wants to manage? Are there trends IU South Bend wants to *create*? For example, is the apparent increase in traditional age students likely to continue? How is that to be managed? Are there enrollment trends at the off-campus sites? How can they be

adjusted? Can accurate projections be made for the impact of tuition reciprocity with a section of Michigan?

- 46% full time and 54% part time
- 50% recent high school graduates and 50% age 24 and older
- 86% undergraduate and 14% graduate
- 64% women and 36% men
- 94% Indiana residents
- 10% students of color
- 3% international students

This is a key discussion for the Enrollment Management Committee. Desired adjustments to the mix should be proposed through the Enrollment Management Committee, and written into the Strategic Enrollment Management Plan.

- The changing ratio of traditional age and non-traditional students at IU South Bend is a topic of some importance. At one meeting a Working Group on Diversity survey was referenced, in which student respondents indicated that they considered the largest category of diversity on campus to be *age*. While there is general understanding that the potential for enrollment stability and/or growth is influenced by the traditional age population, there is also genuine concern that non-traditional students not be overlooked or under-emphasized as a result of this new emphasis.

There should not be over-reaction to this issue, but there may be subtle ways of reassuring all those concerned that traditional and non-traditional populations are not mutually exclusive on campus, and that a somewhat altered mix of full-time and part-time enrollment is a healthy change for the institution. Pilot Project #2 suggests a way of identifying institutional characteristics that influence students across generational lines.

- Emphasize pride in the change of direction and the broadening of goals.

Recruitment

- During my visit, I heard repeated references to the desire for IU South Bend to be *The Campus of First Choice* among its applicants. This comment reflects a perception that IU South Bend is too often a second choice, an “alternate” selection for many students. The desire to see more students declare IU South Bend as their first choice may be an effective theme for recruitment initiatives. It also underscores *the need to focus on ways to persuade prospects to earlier action and earlier commitment*. Available data confirms the fact that continued reliance on enrollment decisions made late in the cycle may result in unexpected enrollment increases or decreases in the Fall Term.
- The recruitment and admission function at Indiana University South Bend appears to be a data-driven, contemporary operation that emphasizes communication and personalization. The data analysis and communication sequences are well planned and current. No one reported a lack of cooperation between related functions, and there seems to be generally good impression of the recruitment effort. Recruitment is the foundation of the enrollment continuum, and an effective recruitment campaign should be supported. The current admissions system – with the exception of scholarship availability – appears to be positioned for expanded recruitment of traditional age students.

The potential for enrollment growth via transfer students is important to the overall plan and should be followed closely. In addition, the recruitment of non-traditional students should reflect the same attention to data-driven strategies.

Thought should be given to making some scholarship funds available for early awards as part of the recruitment process. (See Pilot Project #1.)

- The Financial Aid function, with a relatively new Director, appears to operate effectively, given the awkwardness of the Indiana state grant program, which processes an award based on the first school listed by the applicant on the Free Application for Federal Student Aid (FAFSA). To the extent that this first listing may reflect aspirations rather than realistic choices in students' college selection, grant processing for IU South Bend may be delayed.

Although the grant situation is not the result of IU South Bend action, it characterizes what may be a persistent concern regarding financial aid: can earlier aid determinations be made, so that aid awards can be a positive factor in earlier commitment on the part of prospective and returning students?

The Enrollment Management Committee may wish to make sure all members understand the financial aid application and awarding process. If at all possible, it will be prudent to accelerate the timeline to generate more final determinations of aid at an earlier date.

- The addition of a new Vice Chancellor for Public Affairs and University Advancement, and the implementation of aggressive, integrated marketing initiatives will benefit both recruitment and enrollment management. The Marketing function should remain an essential part of enrollment management efforts, especially in terms of refining *integrated messages to external audiences*, and providing clear communication about the committee to internal audiences.
- Take advantage of a very strong alumni program. Interested and committed alumni can be very important enrollment management champions.
- Consideration of the off-campus sites should be included in the planning of the Enrollment Management Committee. Enrollment trends at those sites, course offerings, the potential for growth, and the recruitment of students to those sites are all appropriate topics for the committee. This consideration will require the co-operation of the Vice Chancellor for Academic Affairs.
- In his October, 2003 speech to the Faculty Senate, Dr. Guillaume expressed his desire to see the Honors Program expanded. Expansion of the Honors Program is a very appropriate topic for the Enrollment Management Committee to include in its planning. It has relevance to both the broad mission of IU South Bend, and to the specific goal of increasing the number of honors-caliber traditional age students recruited to campus.

Retention

- In general, it will be important to the enrollment management effort that the administrative relationship between Academic Affairs and Student Affairs be well defined. Institutions that have separate Academic and Student Affairs divisions must focus on promoting cross-functional activity, whereas IU South Bend possesses the advantage of having a wide range of functions within one unit. This is an appropriate reflection of the necessary balance

between academic pursuit and student life. However, it is important that Student Affairs not be perceived as operating “in the shadow” of Academic Affairs.

The Enrollment Management Committee has the potential to strengthen and further legitimize the administrative identity of the activities clustered under the title of Student Affairs. This result is desirable, and should be encouraged.

- The connection between overall retention and academic advising can be explored further. Based on a limited number of conversations, I would conclude that most faculty members agreed with the move to dissolve the Freshman Division and employ the “Direct Admit” system, and it was stated that advising in large part is taken seriously by the faculty. However, it appears that with the dissolution of the Freshman Division, there is less opportunity to uniformly *track* advising actions. A focused, non-threatening study of academic advising, perhaps in conjunction with a Student Opinion Survey or Survey of Academic Advising, would provide a benchmark for identifying areas of excellence in advising, as well as areas for improvement. This type of study would require the co-operation of the Vice Chancellor for Academic Affairs.
- As a corollary to the observation listed above, it will be important to assure that the offerings of the Academic Support Services Center are sufficiently promoted, and that faculty members are appropriately aware of the value of these services, and utilize them. The results documented in the reports generated as part of the Lilly Grant seemed to clearly validate the retention efforts conducted through the grant program, and the summary report made reference to faculty interest in such efforts being “on the rise.” It will be essential to maintain that momentum. Material presented and discussed during the retention conference at IU South Bend in August, 2002 will be very meaningful to the retention component of the Enrollment Management Committee. In particular, an increase in the number of traditional age freshmen will underscore the importance of an effective Freshman Year Experience program.
- Recent increases in freshmen to sophomore retention rates are commendable. Efforts should be made to sustain or increase that rate. However, attention should also be directed at retention rates beyond the sophomore year, and persistence to graduation, to determine if there are pockets of attrition, and if they occur with particular categories of student.

Housing

- The proposed college housing, to be located on the other side of the St. Joseph River on campus, will have both symbolic and actual import on enrollment issues. It provides both new challenges and opportunities. New campus residence halls will allow the recruitment of students from beyond the commuting area, an important element of the focus on traditional age students. At the same time, it is an obvious symbol for the campus of the impending changes and its impact on campus culture.

The housing of even 500 students will present new challenges for student services, some of which may require new resources or a reallocation of resources. Areas to consider will include residence hall staff, residence hall programming, security issues, dining services, and personal counseling, among others.

As the campus housing project unfolds, it will be valuable to introduce a plan for co-curricular activities that draw upon a larger residential population.

5. PILOT PROJECTS

As the Enrollment Management Committee engages in a more detailed analysis of enrollment issues, the committee can develop a set of pilot projects designed to introduce new strategies, and conduct an ongoing evaluation of the success of these efforts. Outlines of two sample pilot projects are provided. The details listed are recommendations and may require some modification to accommodate specific situations at IU South Bend.

PILOT PROJECT # 1: Scholarship Awards and the Recruitment of High Achieving Students

This project requires close cooperation between the Office of Admissions, the Office of Financial Aid, the Office of Student Scholarships, and the Honors Program to coordinate communication about scholarships and to assure that the OFA staff is able to maintain accurate files to avoid over-awarding and to monitor scholarship expenditures.

1.

Using responses to targeted direct mail student searches, and other inquiry generating recruitment activities, identify high achieving prospective students who may qualify for scholarships. Use an expanded and customized communication sequence to encourage early application. Enhance communication about scholarship assistance in the sequence. If appropriate, develop new scholarship materials that are brief, focused on scholarships for new students and that promote a streamlined selection process. Consider strategically how the prospect of early scholarship notification may stimulate earlier or additional applications from qualified students.

2.

Use the web site and other electronic recruiting techniques, including e-mail, information programs, contacts with high school guidance offices, and other external and internal contacts to disseminate details about this program.

3.

After the Honors Program candidates have been identified and forwarded to the Honors Program Director, develop a database of students in the next tier of academic credentials. Using general scholarship funds that can be awarded on the basis of academic achievement information found in the admissions database, award admitted applicants who meet the prescribed criteria of this next tier of students shortly after the Honors decision is made. Send the award notification as early as possible.

4.

Send the scholarship notification as a personal letter from the Admissions Director or Financial Aid Director. Include a certificate of award. At brief intervals, send a letter of congratulations from the Vice Chancellor for Academic Affairs and a note card from the Chancellor.

5.

Hold a reception program for scholarship recipients early in the Spring. Include faculty members who may be interested in scholarship caliber students.

Note: this program should not be designed to compete with the Honors Program, and it does not need to exclude students who receive scholarships that *do* require the full application. Those recipients can be included in this procedure at an appropriate point in time.

PILOT PROJECT # 2: Developing a Matrix for Overlapping Generations

Because of the focus on long-term objectives and lasting values, the mission of most American colleges and universities is not likely to be limited to the characteristics and aspirations of a single generation. The mission of higher education crosses generational borders. This is clearly the case at IU South Bend.

To combat skepticism, and to optimize campus buy-in, marketers and enrollment managers should maintain a focus on the institutional mission, while proposing new ways to present the mission, and new methods of delivering the educational experience that is part of the mission. Using generational characteristics does not diminish the institutional mission. It allows it to be interpreted anew for each generation and their needs. In that sense, it can broaden the application of the institution's mission.

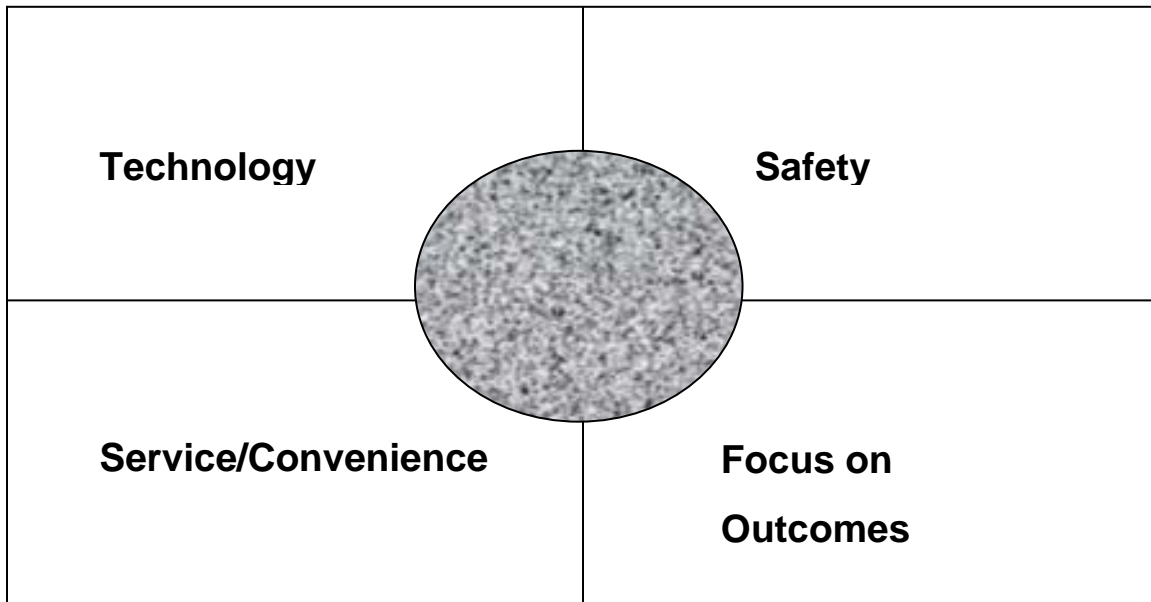
As with most marketing operations in higher education, it is essential to present serious data in support of campaigns. It is also useful to coordinate marketing efforts with parallel activities on campus, such as programming in Student Affairs and Academic Support Services, or pedagogical programs in Academic Affairs. An increasing number of faculty orientation programs and conferences on teaching and learning now include components dealing with generational issues.

Finally, it can be very effective to identify relevant topics that attract campus-wide interest, and to merge marketing efforts with those topics. One pertinent example is the attention being given the technological savvy of the Millennial Generation. For instance, discussions of the pedagogical and technical elements of instructional technology can blend into marketing presentations using common points of reference and resulting in less confrontation.

Using available data and survey responses, determine which institutional characteristics are important factors to *all* generational groups on campus. Chart those characteristics in a matrix that illustrates where overlap exists. The areas of overlap can then be used to craft marketing and recruitment messages, and develop retention initiatives and messages.

In this sample matrix, the areas of *Technology*, *Safety*, *Service*, and a *Focus on Outcomes* have been identified as characteristics that are important to non-traditional students, traditional age students, and their parents alike. These factors will then be featured in publications and other communication vehicles that can be used with various age groups. Other illustrations can be developed to identify characteristic that appeal to specific groups. Appropriate communication decisions can then be made for specialized publications as messages. In this way, the campus is able to establish a databased communications grid to drive marketing and enrollment efforts that are sensitive to overlapping generations.

Example of a Matrix of Institutional Characteristic for Overlapping Generations



¹ Kotler, Philip and Karen Fox. *Strategic Marketing for Educational Institutions*. New Jersey: Prentice-Hall, 1995.

² Dennis, Marguerite J. *A Practical Guide to Enrollment and Retention Management in Higher Education*. Westport, CT: Bergin & Garvey, 1998.

6. READING LIST

The following list of books and magazines or journals is suggested as a set of materials that provide information about enrollment management, recruiting and admissions, retention, customer service, and marketing topics that are especially relevant to enrollment management. These materials can help focus discussions in meetings of the enrollment management committee and related working groups.

- Albrecht, Karl and Ron Zemke. *Service America!* New York: Warner Books, 1985.
- Beckwith, Harry. *Selling the Invisible*. New York: Warner Books, 1997.
- Dennis, Marguerite J. *A Practical Guide to Enrollment and Retention Management in Higher Education*. Westport, CT: Bergin & Garvey, 1998.
- Gaither, G. H., ed. *Promising Practices in Recruitment, Remediation, And Retention*. San Francisco: Josey: Bass, 1999.
- Hossler, D., ed. *Evaluating Student Recruitment and Retention Programs*. San Francisco: Josey: Bass, 1991.
- Howe, N. and W. Strauss. *Millenials Go to College*. AACRAO, 2003.
- Keller, George. *Academic Strategy*. Baltimore: The Johns Hopkins University Press, 1983.
- Kotler, Philip and Karen Fox. *Strategic Marketing for Educational Institutions*. New Jersey: Prentice-Hall, 1995.
- Levitt, Theodore. *The Marketing Imagination*. New York: The Free Press, 1983.
- Matthews, Anne. *Bright College Years*. New York: Simon and Shuster, 1997.
- Rigol, Gretchen W. *Admissions Decision-Making Models: How U.S. Institutions of Higher Education Select Undergraduate Students*. College Entrance Examination Board, 2003.
- Sevier, R.A. *Thinking Outside The Box*. Hiawatha, IA: Strategy Publishing, 2001.
- Topor, R. S. *Institutional Image: How to Define, Improve, Market It*. Washington, DC: Council for the Advancement and Support of Higher Education, 1983.

American Demographics
CASE Currents
Change Magazine
The College Board Review
Journal of College Admission
Journal for the Marketing of Higher Education
University Business

The Chronicle of Higher Education