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*Advancing
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A Year (or More?) of Admissions Uncertainty: The Impact on Staff and Prospective Students

A Discussion Organized by:

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The College Board Forum

October 2009

A Climate of Concern in Enrollment Management

- ❖ **“Downturn Expected to Drive Tuition Up”**
The New York Times, October 30, 2008
- ❖ **“For Many Economy Shelves College Plans”**
Uwire.com, November 24, 2008
- ❖ **“College May Become Unaffordable for Most in U.S.”**
The New York Times, December 3, 2008
- ❖ **“Small Private Colleges Freeze Hiring and Pay Increases in Favor of Student Aid”**
The Chronicle of Higher Education, December 19, 2008
- ❖ **“Applications Soar at Public Colleges”**
Boston Globe, December 23, 2008
- ❖ **“Admissions Officials Anticipate a Spring of Uncertainty”**
The Chronicle of Higher Education, January 16, 2009
- ❖ **“Well-Regarded Public Colleges Get a Surge of Bargain Hunters ”**
The New York Times, March 2, 2009
- ❖ **“Private Colleges See Applications Decline”**
The Daily Pennsylvanian, March 20, 2009
- ❖ **“For Top Colleges, Economy Has Not Reduced Interest”**
The New York Times, March 29, 2009

Guiding Questions

- Overall, did colleges and universities survive the economic crisis of the past year?
- What strategies helped to achieve enrollment goals? Will the same things work this year?
- What turned out to be the biggest obstacles to achieving desired enrollments last year?
- Will this year's seniors behave like last year's? What are guidance professionals hearing from students?
- How do those in leadership positions support and maintain the staff momentum and morale necessary in challenging times?

Reflecting on this Past Year and Looking Ahead

❖ **Observations and Talking Points Based on:**

- A study of **380** senior-level enrollment officials at four-year colleges and universities conducted in June/July 2009; national composition; 31% public and 68% private institutions
- A nationwide “college decision” survey of students (**22,734** high school seniors and **8,132** juniors) and **5,705** parents fielded in February/March 2009, with follow-up surveys of **3,205** seniors and **983** parents of seniors in May 2009
- The experience of Fordham University during this period
- Trends seen with Maguire Associates’ clients

❖ **Audience Response**

- Do you resonate with what you see in this data?
- How has your institutional experience differed?
- What should we be thinking about now for this enrollment cycle?



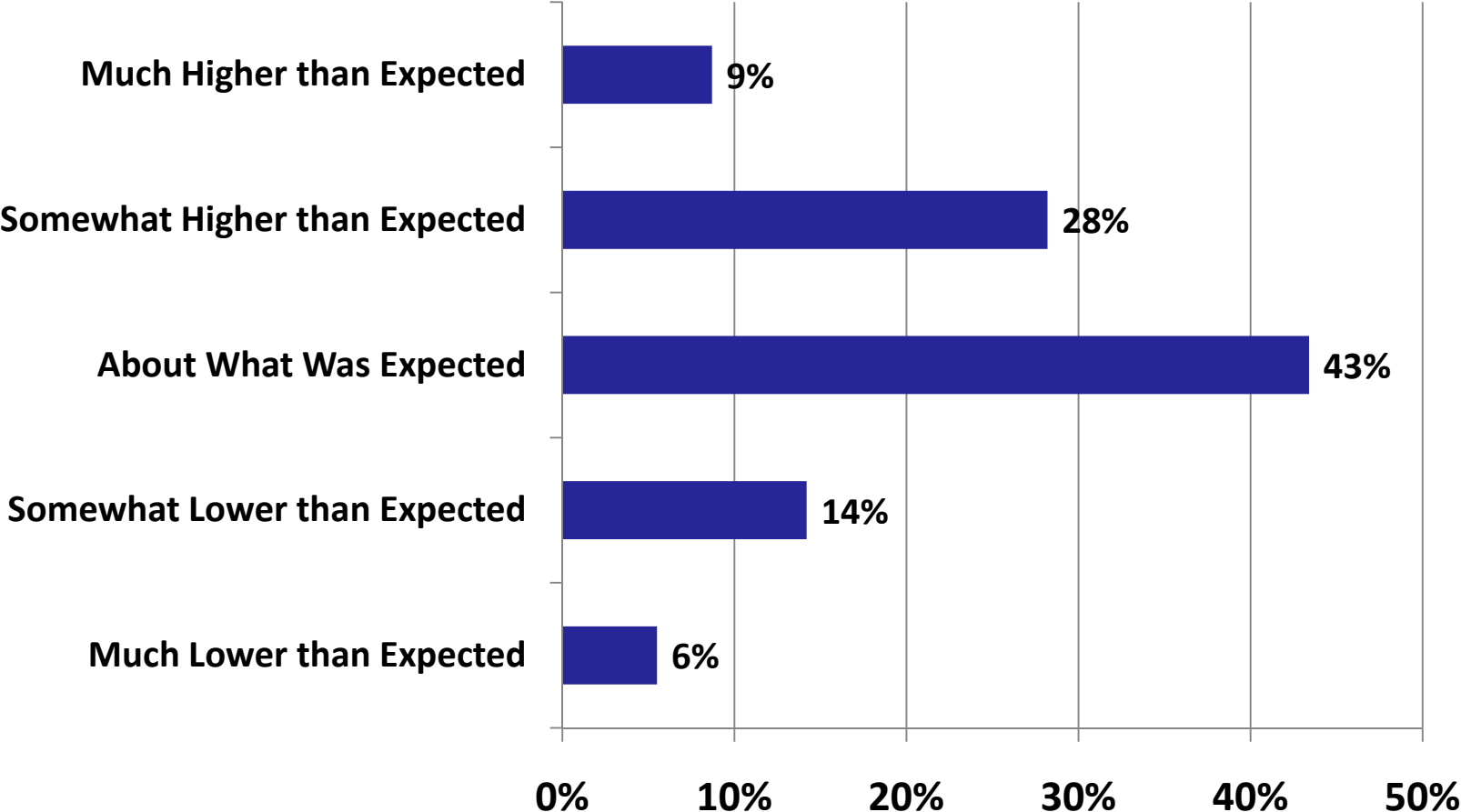
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How Did First-Year Enrollment Fare in 2009?

Fall 2009 Enrollment vs. Initial Board & President Expectations

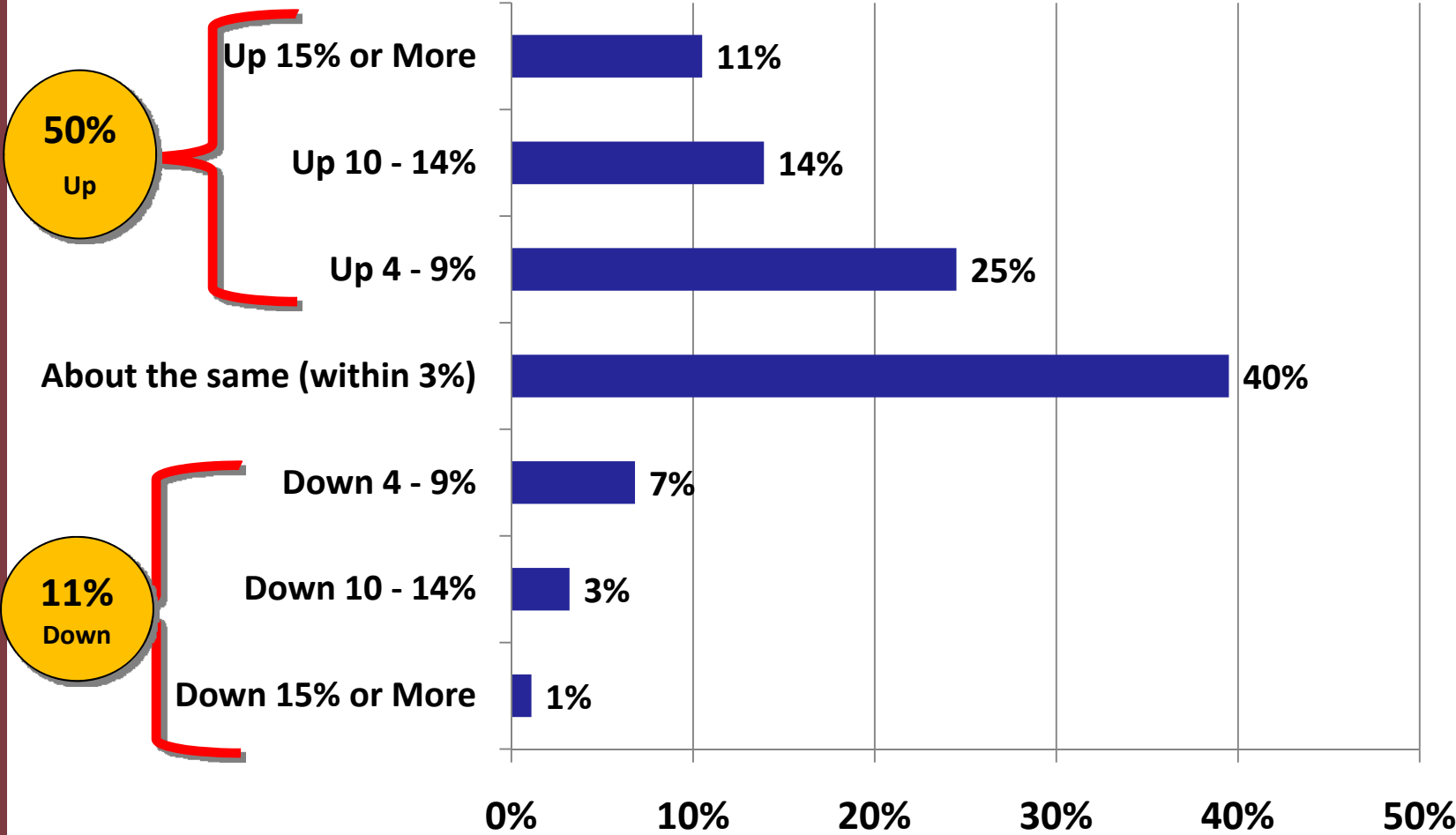
Only about 1 in 5 respondents say fall 2009 enrollment is lower than initial expectations.



Q: How will Fall 2009 undergraduate enrollment compare to the expectations set by your school's President and Board of Trustees at the start of the enrollment cycle (i.e., expectations set in Fall 2008)?

Change in Admission Inquiries: 2009 vs. 2008

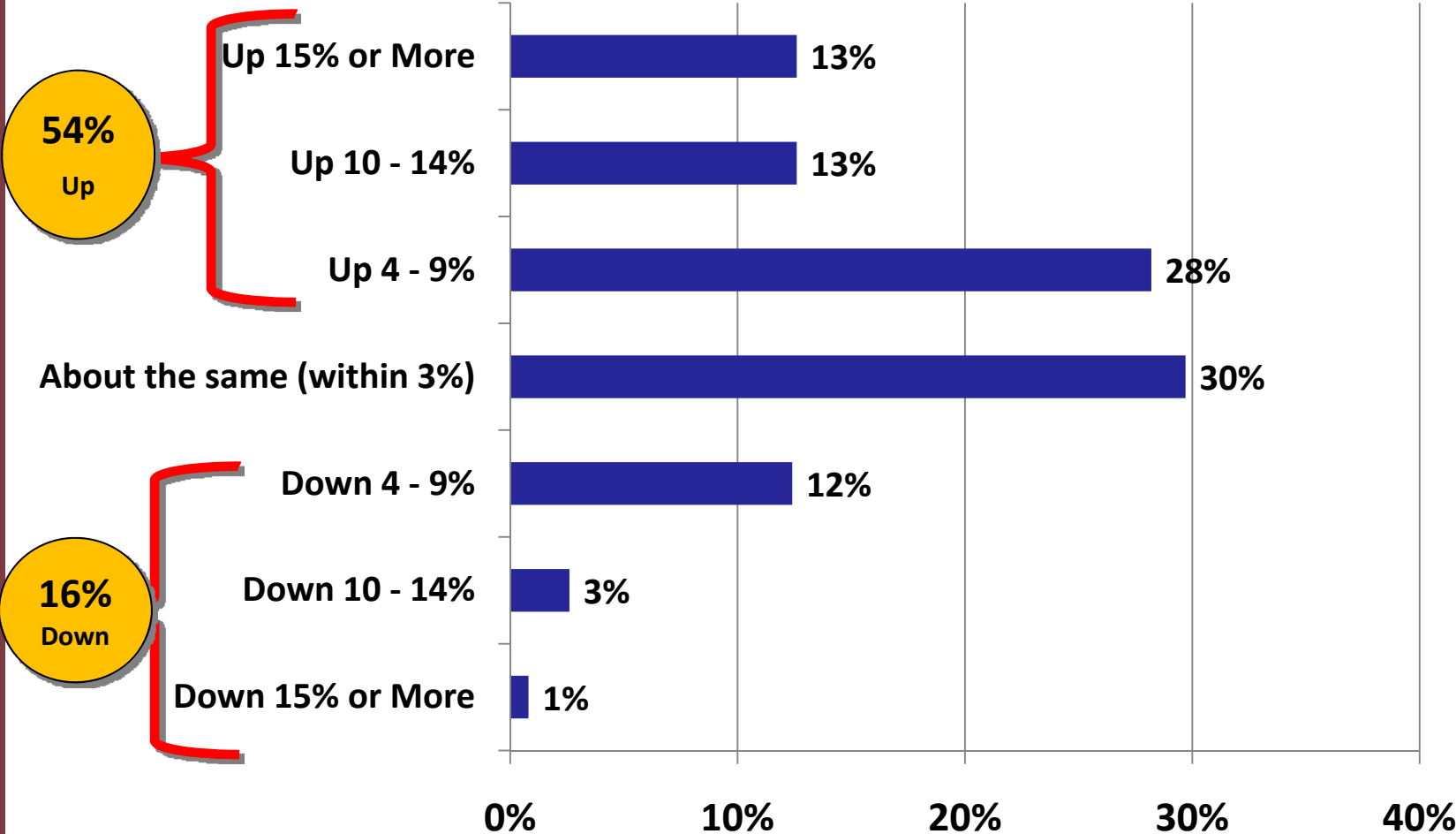
The vast majority of schools saw inquiries hold steady or increase.



Q: For each of the following [admission inquiries], how do your school's Fall 2009 first-year totals compare to last year's?

Change in Accepted Students: 2009 vs. 2008

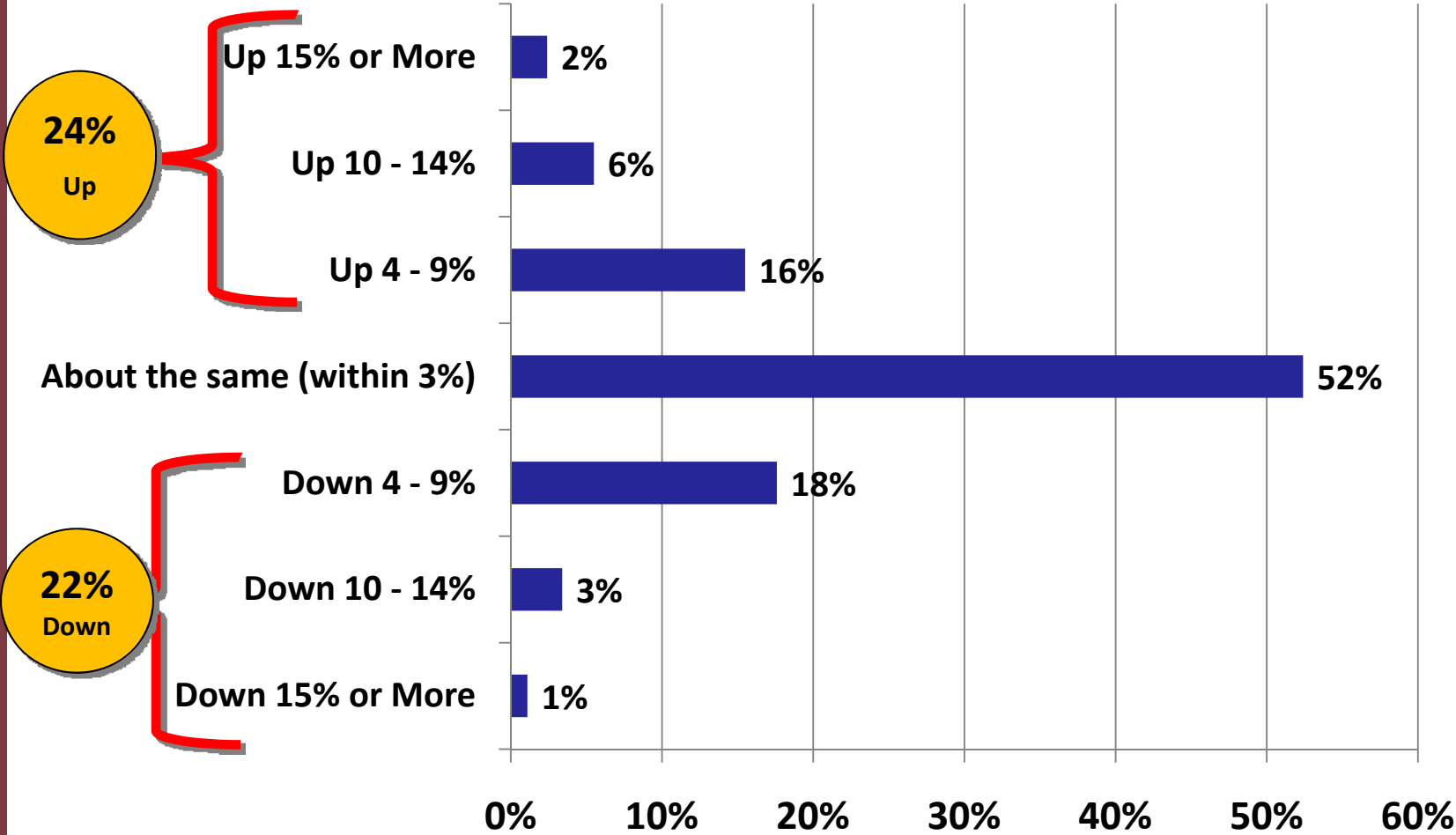
There was a strong trend of accepting more students for fall 2009 enrollment.



Applications were up in 56% of schools, even in 26%, and down in 17%

Change in Yield Rate: 2009 vs. 2008

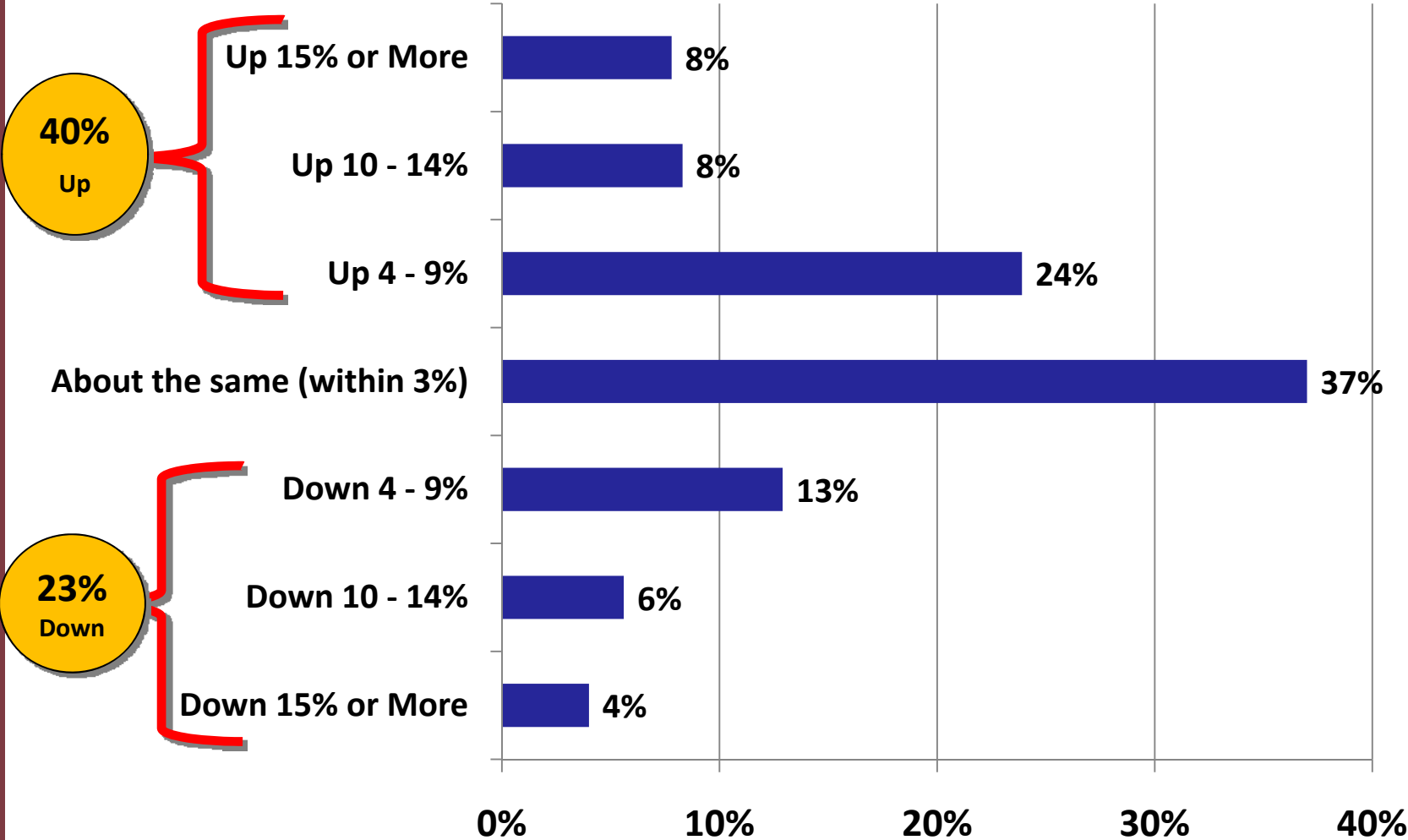
Most yield rates for the 2009 cycle were comparable to those of 2008, but substantial swings (up and down) were noted in almost half the schools.



Q: For each of the following [yield rate], how do your school's Fall 2009 first-year totals compare to last year's?

Change in Enrolling Students: 2009 vs. 2008

A higher proportion of respondents report enrollment gains than losses.



Q: For each of the following [enrolling students], how do your school's Fall 2009 first-year totals compare to last year's?

Change in Enrolling Students by School Type

Although enrollment mostly held steady or increased across school types, private colleges saw the largest proportion of decreases.

	Private, Comprehensive	Private, Liberal Arts	Public, Comprehensive	Public, Liberal Arts
2009 Enrollment Is Up	38%	35%	44%	57%
2009 Enrollment Is About The Same	38%	38%	37%	39%
2009 Enrollment Is Down	24%	27%	19%	4%

Change in Enrolling Students by School Size

Likewise, schools with less than 2,000 students were most vulnerable to enrollment drops.

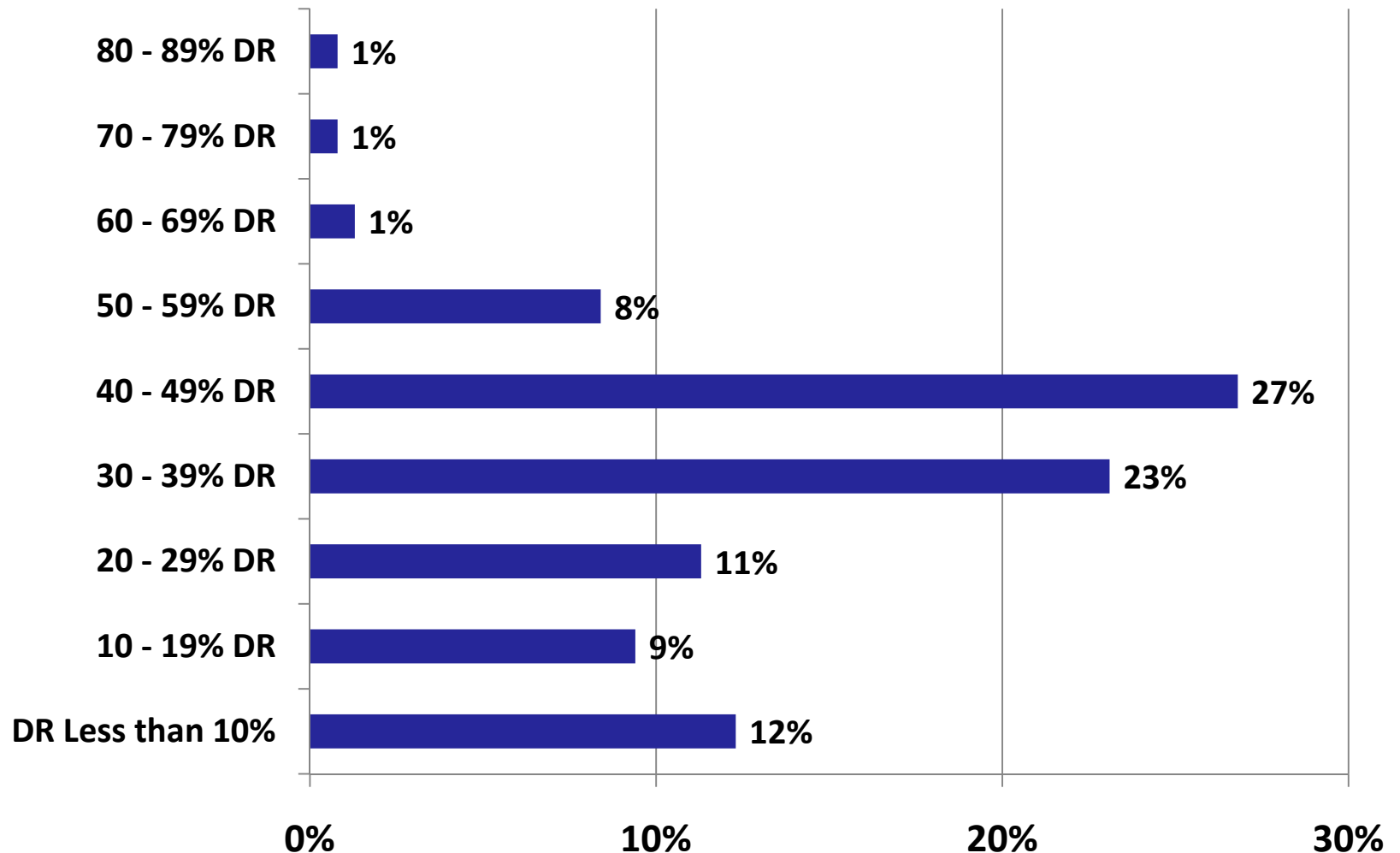
	Less than 2,000 Students	2,000 – 5,000 Students	5,000 Students or More
2009 Enrollment Is Up	39%	38%	44%
2009 Enrollment Is About The Same	32%	44%	39%
2009 Enrollment Is Down	30%	18%	17%

Change in Enrolling Students vs. Expectations

At about 40% of the schools where enrollment is down, enrollment met or exceeded expectations; some schools may have aimed for this, while others may have set lower expectations in response to market conditions.

	2009 Enrollment Is Up	2009 Enrollment Is About the Same	2009 Enrollment Is Down
Enrollment Exceeded Expectations	62%	29%	5%
Enrollment Met Expectations	35%	58%	35%
Enrollment Fell Short of Expectations	3%	13%	61%

Total Discount Rate for 1st Year Undergraduates



Q: What is the total discount rate (the proportion of grant aid relative to the total amount of gross tuition and required fees, including both endowed and non-endowed aid) for first-year undergraduates at your school?

Change in Enrolling Students by Discount Rate

All Colleges and Universities Surveyed

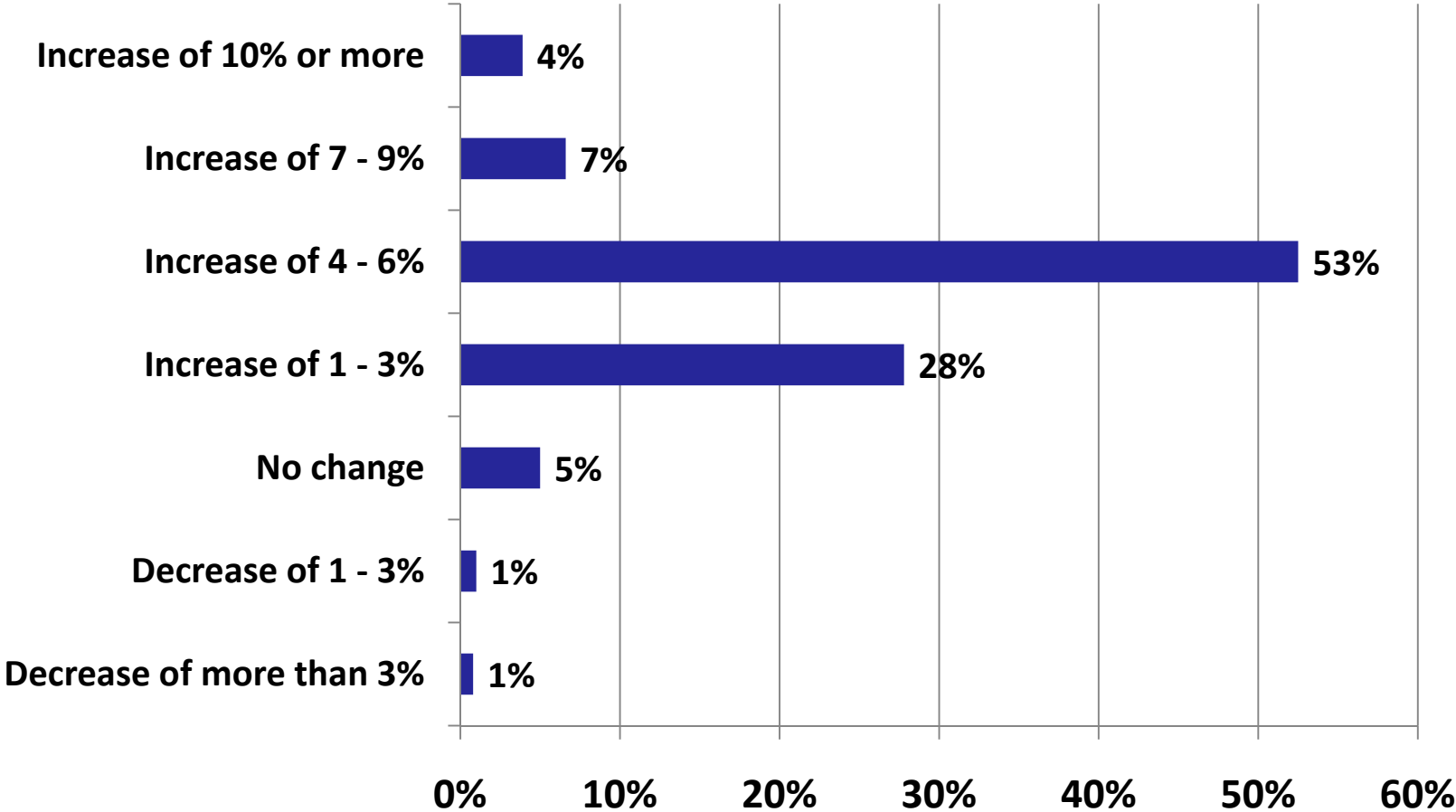
	DR = Less than 30%	DR = 30 – 39%	DR = 40 – 49%	DR = 50% or More
2009 Enrollment Is Up	45%	31%	37%	49%
2009 Enrollment Is About The Same	41%	44%	38%	22%
2009 Enrollment Is Down	14%	24%	25%	29%

Private Colleges and Universities Only

	DR = Less than 30%	DR = 30 – 39%	DR = 40 – 49%	DR = 50% or More
2009 Enrollment Is Up	46%	26%	35%	45%
2009 Enrollment Is About The Same	35%	48%	40%	19%
2009 Enrollment Is Down	19%	26%	25%	36%

Change in Cost of Attendance: 2009 vs. 2008

Nearly all schools increased their prices, but most did so by 6% or less.



Q: Since 2008, how did the full cost of undergraduate attendance change at your school?

Change in Enrolling Students by School Cost

There is little relationship between enrollment changes and school cost.

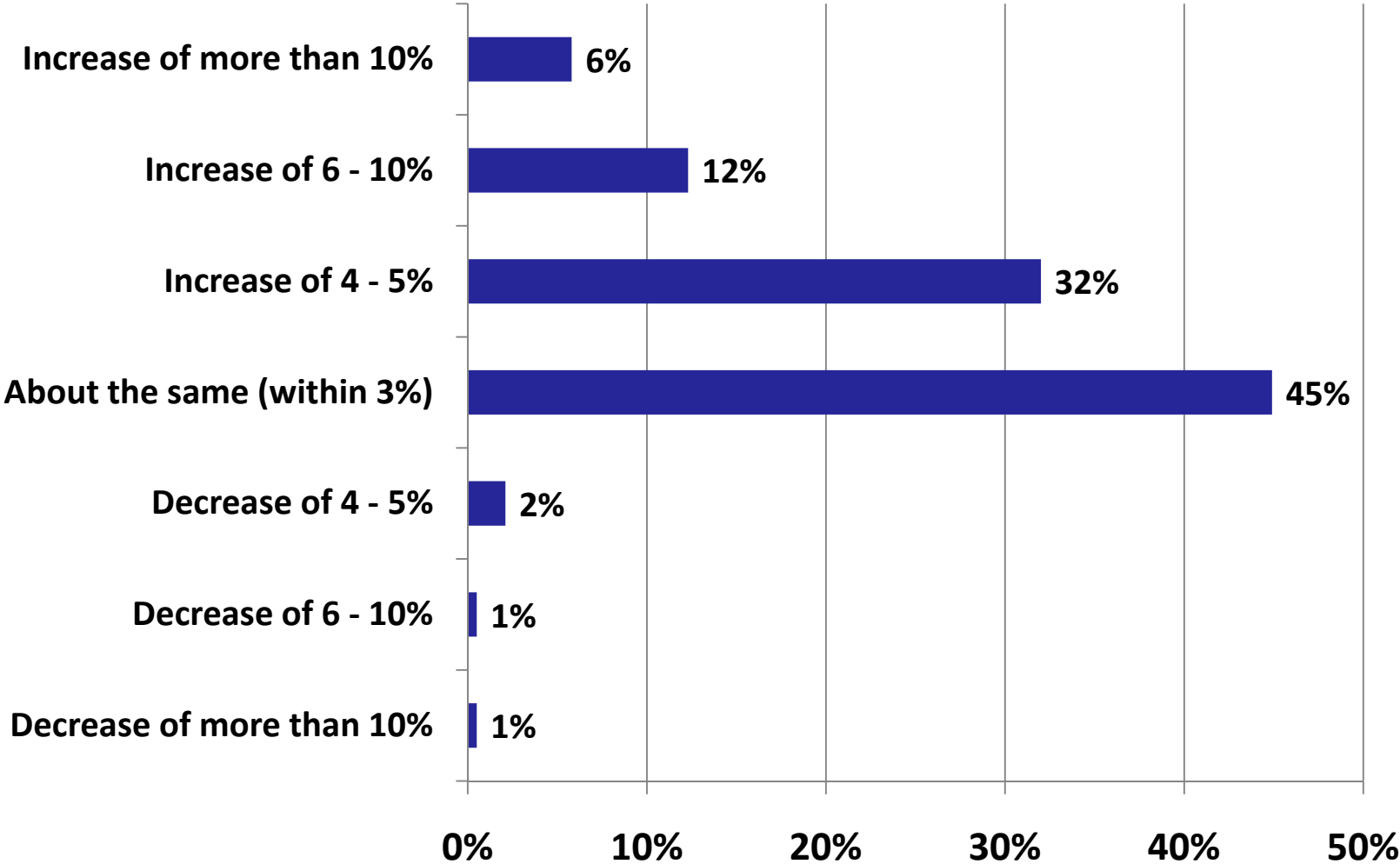
	School Cost = Less than \$30K	School Cost = \$30- \$40K	School Cost = \$40K or More
2009 Enrollment Is Up	43%	37%	37%
2009 Enrollment Is About The Same	36%	36%	41%
2009 Enrollment Is Down	21%	26%	22%



Qs: For each of the following [enrolling students], how do your school's Fall 2009 first-year totals compare to last year's? What is the full-pay, direct cost of attendance (including tuition, fees, room & board) for a full-time, first-year undergraduate at your school?

Change in Financial Aid Allocation: 2009 vs. 2008

About half of schools increased their financial aid allocations.



Q: How does the amount of money that your school allocated to financial aid (need and merit aid, endowed and non-endowed) for Fall 2009, first-year undergraduate enrollment compare to the amount allocated for Fall 2008?

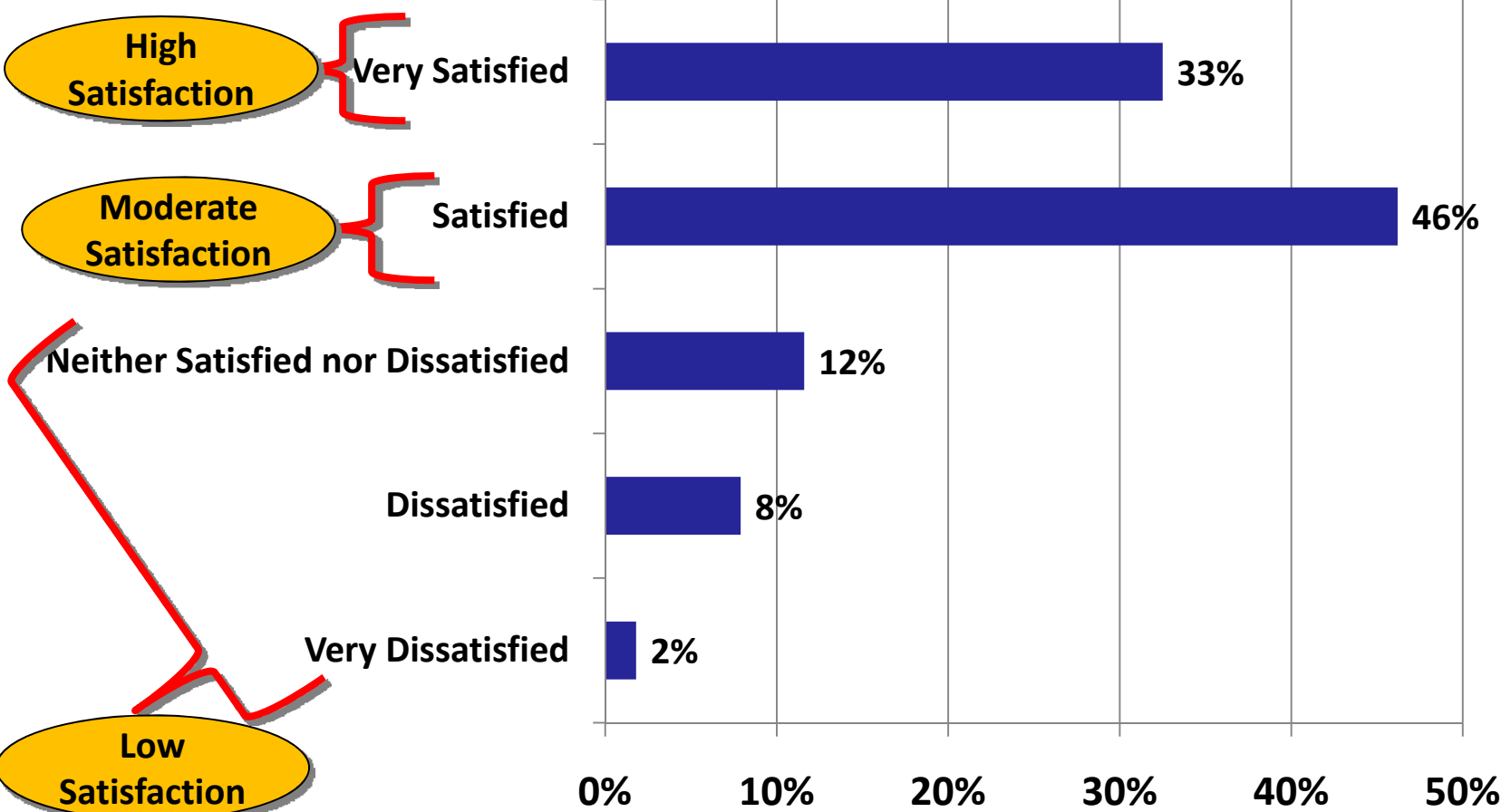
Change in Financial Aid by School Type

Private comprehensive colleges were most likely to have increased aid by 6% or more, while most public schools kept aid the same.

	Private, Comprehensive	Private, Liberal Arts	Public, Comprehensive	Public, Liberal Arts
Increased Aid by 6% or More	28%	18%	13%	10%
Increased Aid by 4-5% or More	34%	37%	29%	19%
Kept Aid the Same	39%	45%	58%	71%

Overall Satisfaction with Fall 2009 Enrollment Efforts

The vast majority of SEOs are 'satisfied' or 'very satisfied' with the enrollment efforts of their institutions for fall 2009.



Q: All things considered, how satisfied are you with your institution's undergraduate enrollment efforts for Fall 2009?

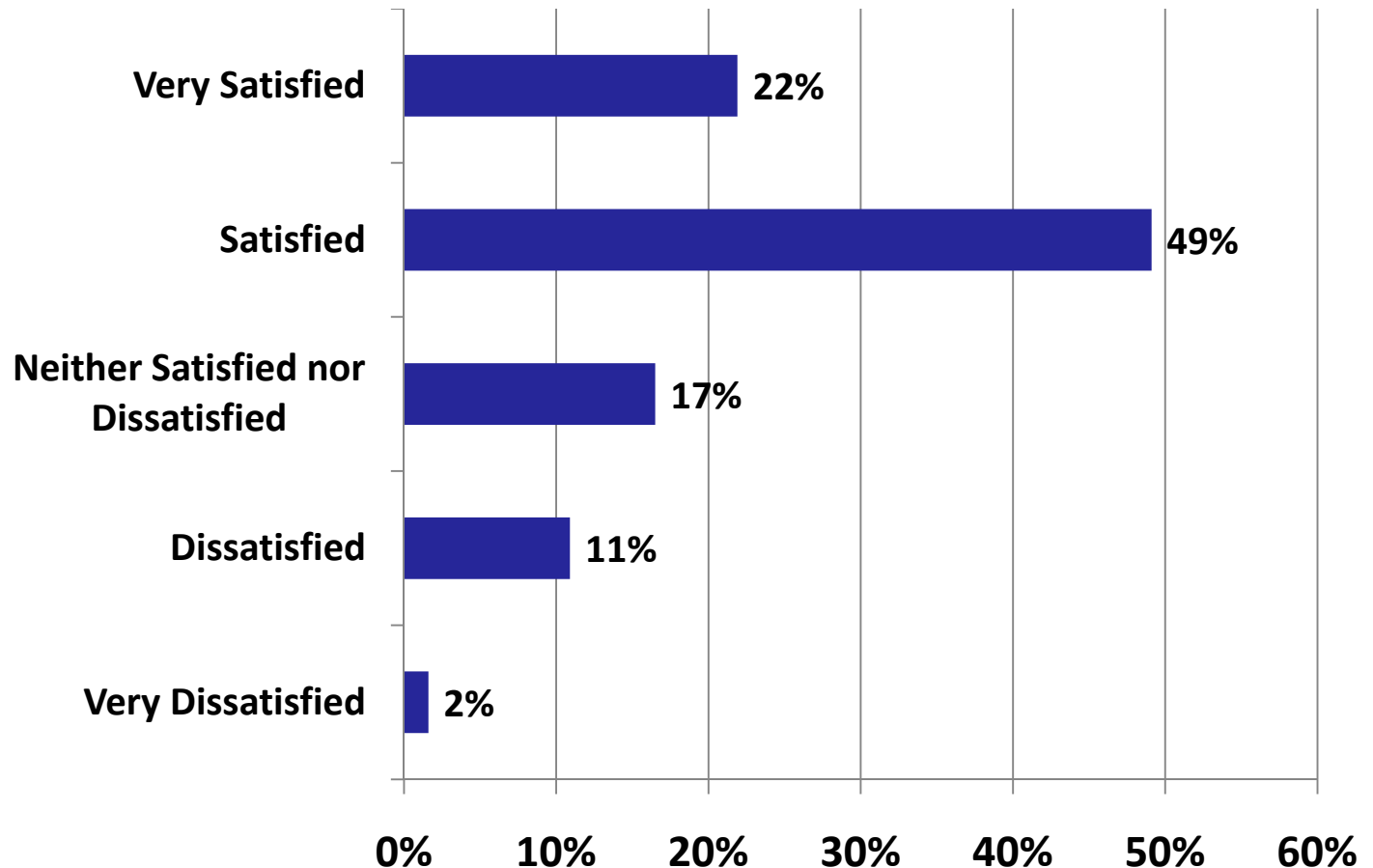
Change in Enrolling Students vs. Satisfaction

It appears that enrollment drops were intentional at only a small proportion of schools.

	2009 Enrollment Is Up	2009 Enrollment Is About the Same	2009 Enrollment Is Down
High Satisfaction	39%	37%	13%
Moderate Satisfaction	51%	49%	33%
Low Satisfaction	11%	14%	54%

Satisfaction with Institutional Response to Economic Downturn

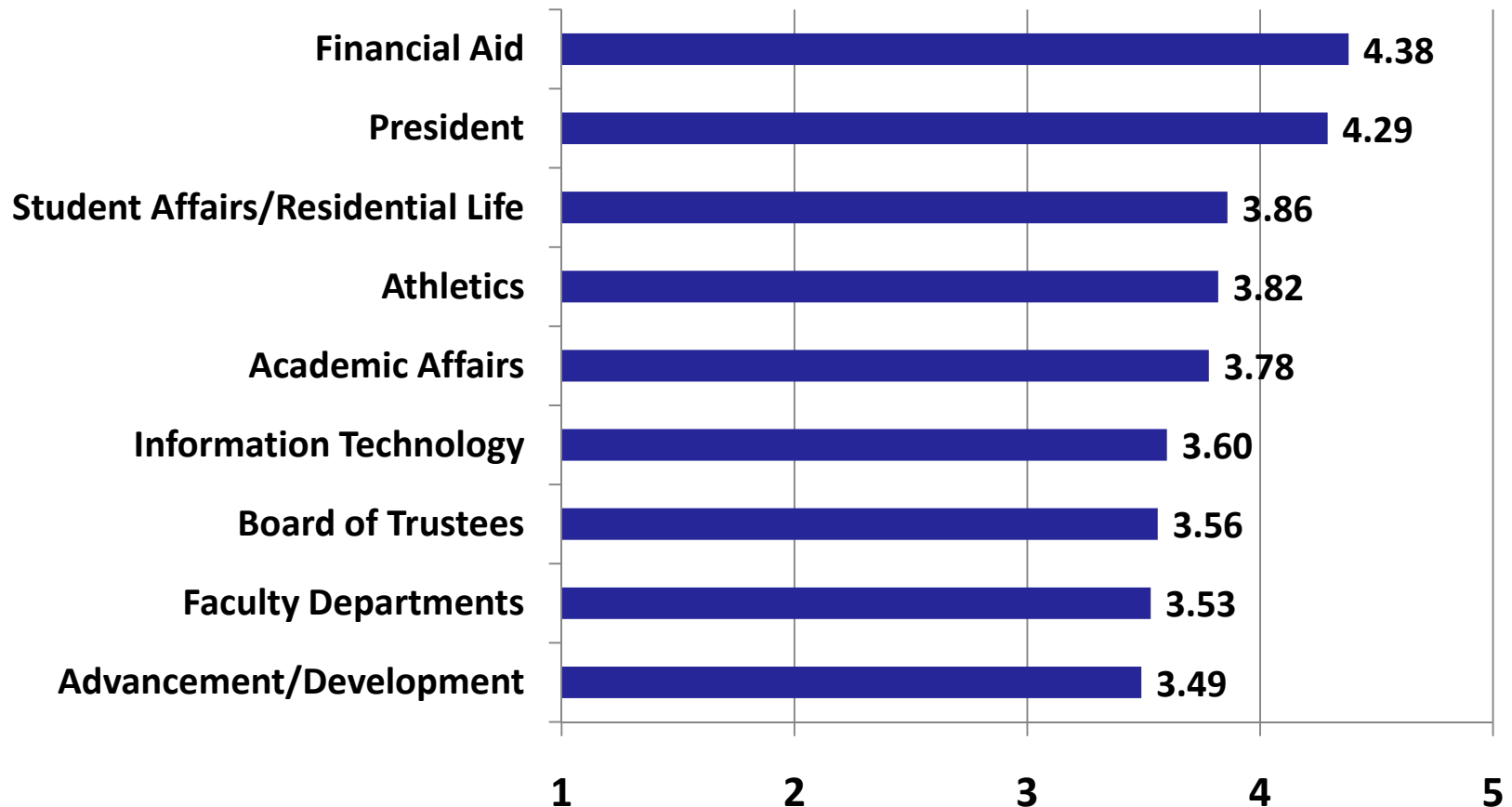
Likewise, most SEOs are 'satisfied' or 'very satisfied' with how their institutions responded to the economic downturn.



Q: From an undergraduate recruitment perspective, how satisfied are you with your institution's response to the economic downturn in the past year?

Satisfaction with Inter-Department Cooperation

SEO's report greatest satisfaction with their financial aid offices and presidents, and least satisfaction with IT, boards, faculty, and advancement.

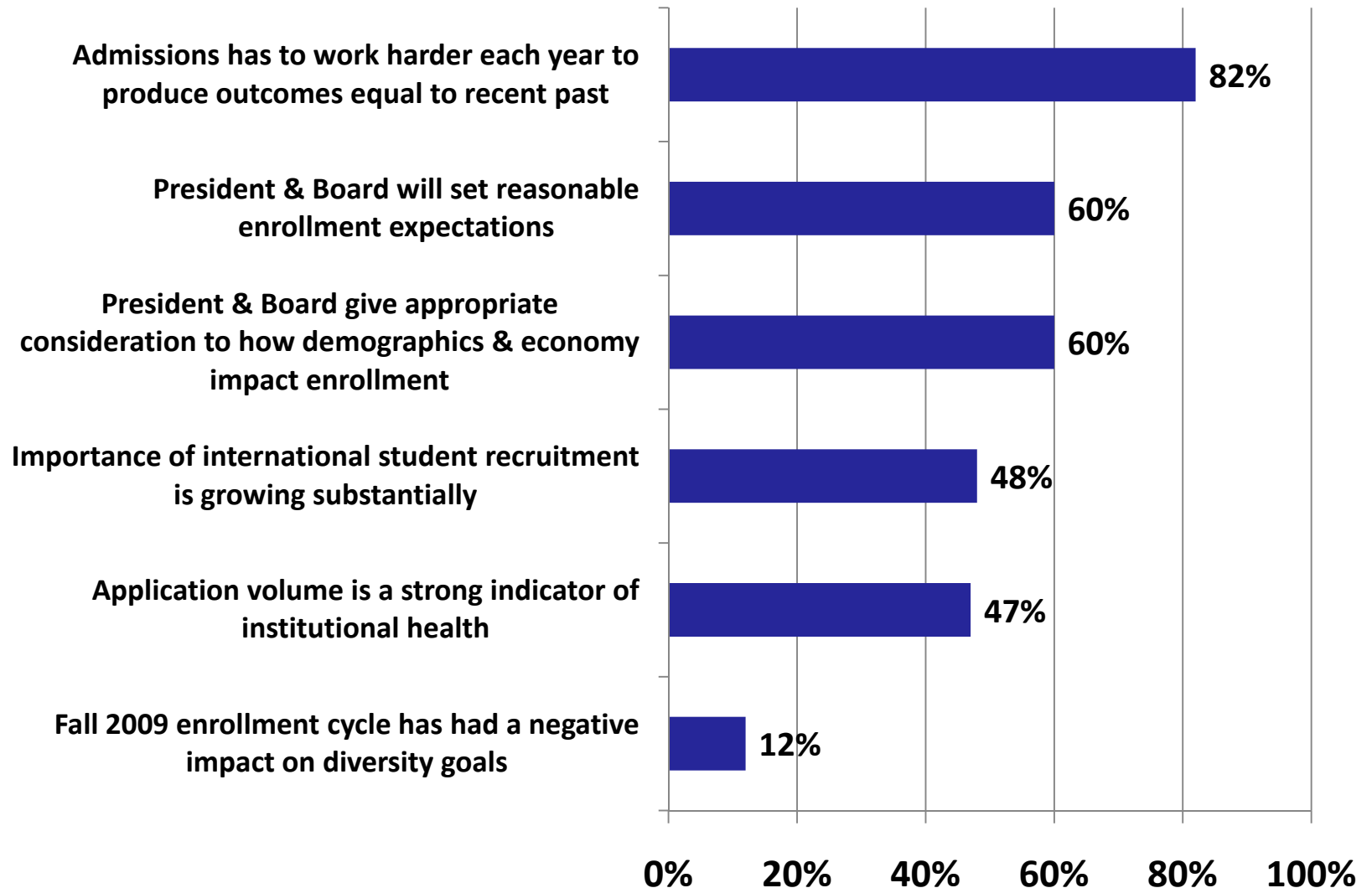


Q: How satisfied are you with the cooperation provided to undergraduate admissions by the following offices at your school? Scale: 1 = Very Dissatisfied to 5 = Very Satisfied

Strongest Correlates of Overall Enrollment Satisfaction

- ❖ Cooperation Provided by Board of Trustees ($r = .26$)
- ❖ Cooperation Provided by the President ($r = .23$)
- ❖ Cooperation Provided by Academic Affairs ($r = .20$)

Agreement with Statements



Q: Please indicate the extent to which you agree or disagree with the following statements.
Scale: 1 = Strongly Disagree to 5 = Strongly Agree (% responding '4' or '5' displayed)

Closing Comments from Survey Participants: Trends; What Hindered or Helped this Past Year?

❖ **Admissions**

- ❖ Dipped deeper into applicant pool
- ❖ Some boost in quality this year
- ❖ Declining yields
- ❖ Definite movement to community colleges in some regions
- ❖ “Average” academic students selected lower-cost institutions
- ❖ Use of waiting list

❖ **Finances**

- ❖ Average need of students increased
- ❖ Willing to move discount rate higher to protect revenue
- ❖ More appeals and negotiating
- ❖ Higher or stable yields among the neediest students
- ❖ Decreased state support (or threat of) for needy students

❖ **Enrollment**

- ❖ Retention up or steady
- ❖ Increase in number of transfer students enrolled

Comments from Survey Participants: Trends; What Hindered or Helped this Past Year?

❖ **What helped this past year?**

- ❖ Good outcomes data (employment, salaries, grad school)
- ❖ Being fully staffed
- ❖ Sophisticated communication flow
- ❖ Momentum: the cumulative benefit of years of smart work
- ❖ Involvement of alumni, students, faculty, at yield stage
- ❖ Supportive President and Board
- ❖ Collaborative leadership
- ❖ Being aggressive from the start

❖ **What hurt enrollment efforts?**

- ❖ Staff turnover
- ❖ Change in administrative leadership
- ❖ Mixed signals, lack of clarity in goals
- ❖ Smaller applicant pools
- ❖ Difficulty determining yields on soft applications
- ❖ Delays in developing and offering new academic programs



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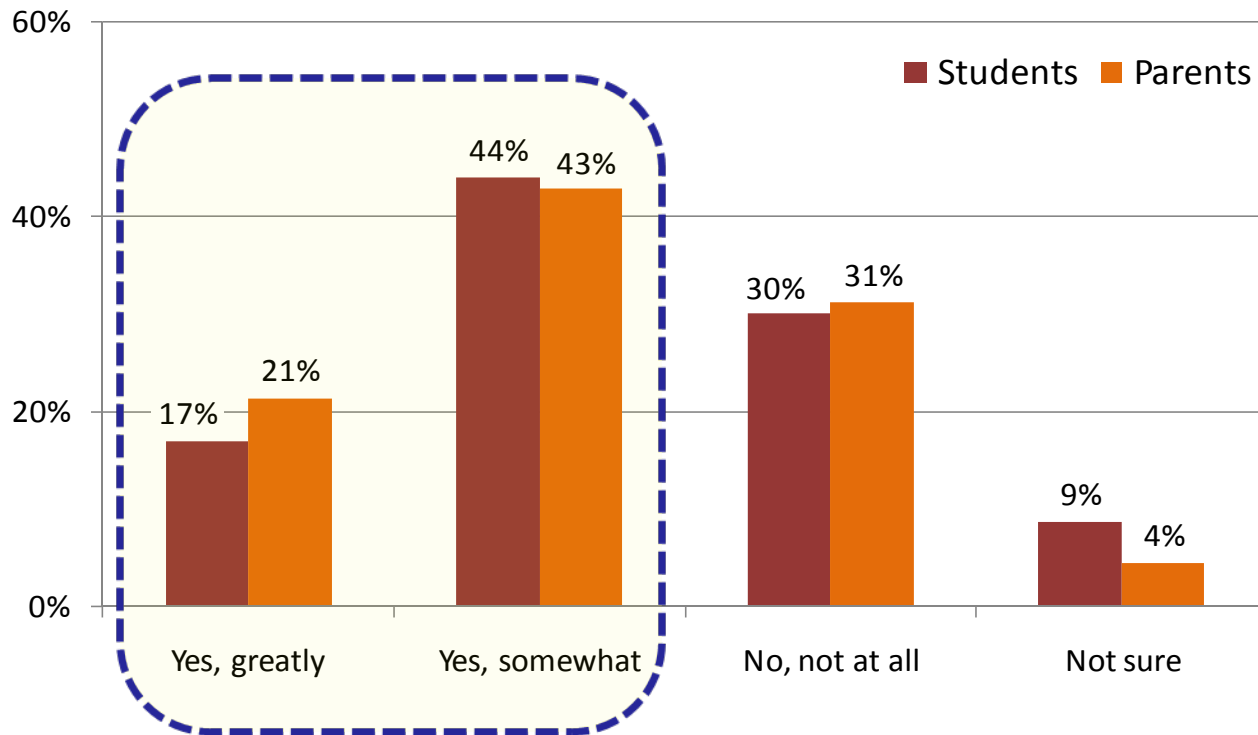
What Was the Impact of Last Year on Students and Parents?

Top College Priorities

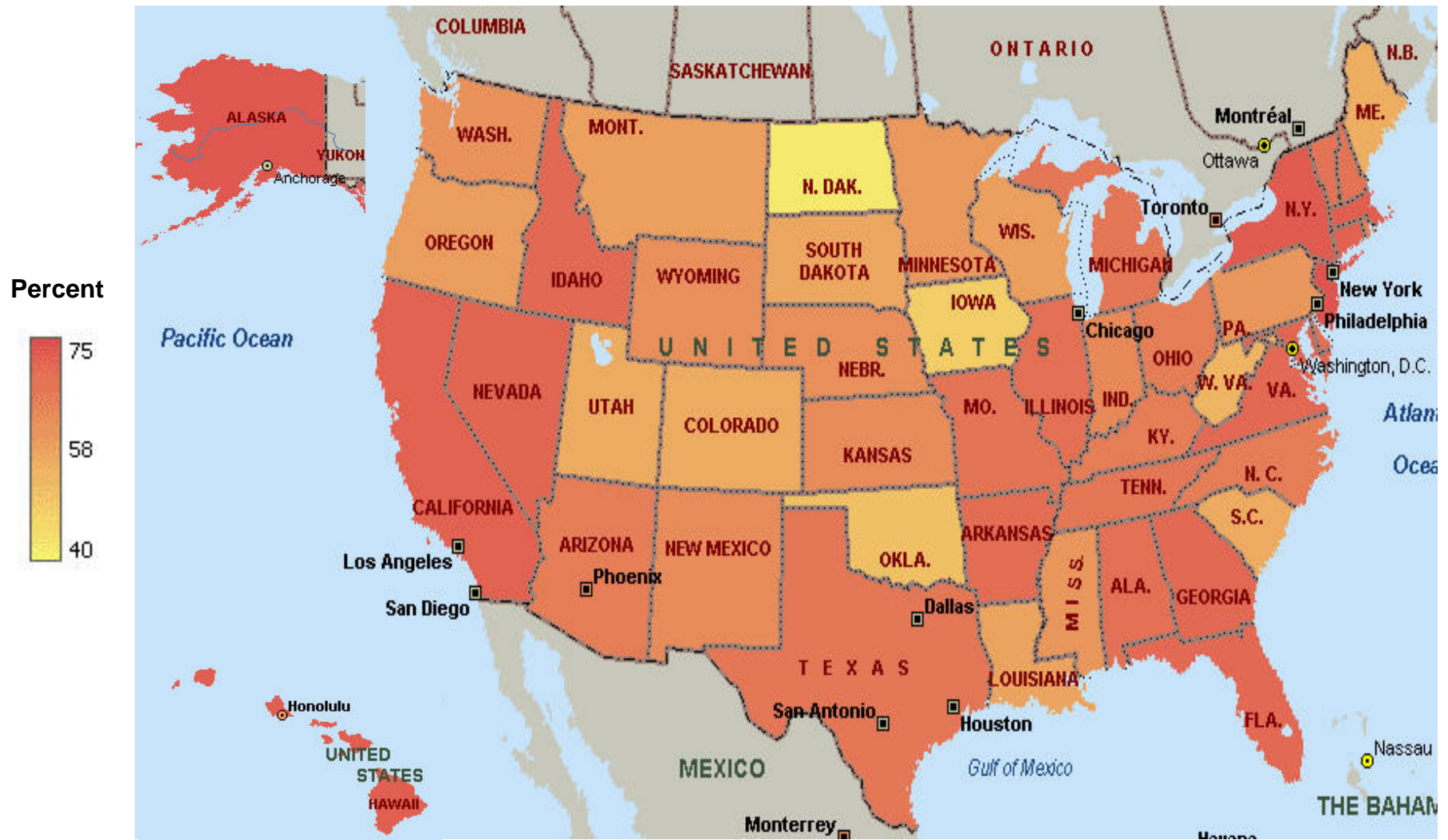
Students' and parents' overall college priorities remained consistent with recent years:

- **Academics**
 - ✓ Quality of major
 - ✓ Practical, career-oriented coursework and majors
 - ✓ Academic reputation
 - ✓ Quality of students
- **Costs/Financial Aid**
 - ✓ Total costs
 - ✓ Availability of merit- or need-based financial aid
- **Personal Attention to Students**
- **Value of Education**
- **Preparation for the Future**
 - ✓ Employment opportunities after graduation
 - ✓ Preparation for graduate/professional school
- **Campus Related**
 - ✓ Academic facilities
 - ✓ Campus atmosphere
 - ✓ Campus safety and security

Influence of Economic Concerns on Application Schools

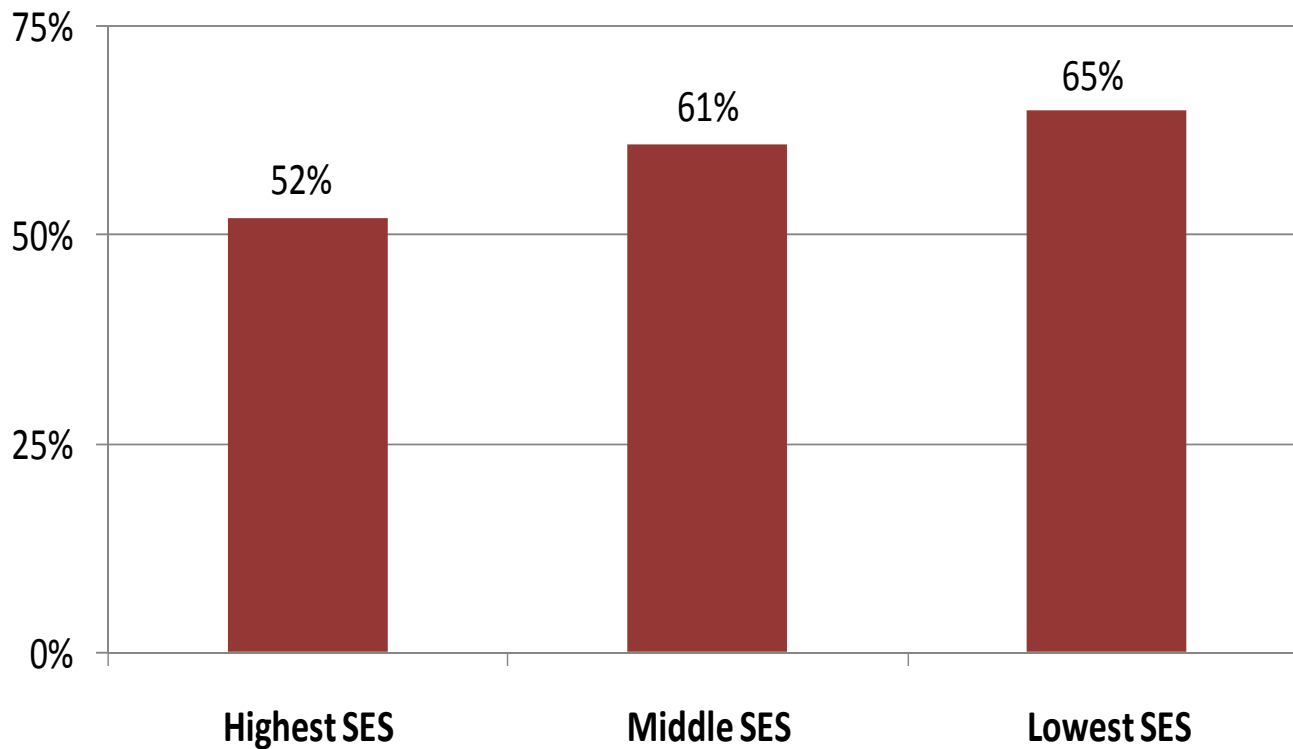


Seniors Reporting Concerns About the U.S. Economy Will "Greatly" or "Somewhat" Influence Their Application Choices



Influence of Concerns on Applications by Socioeconomic Status

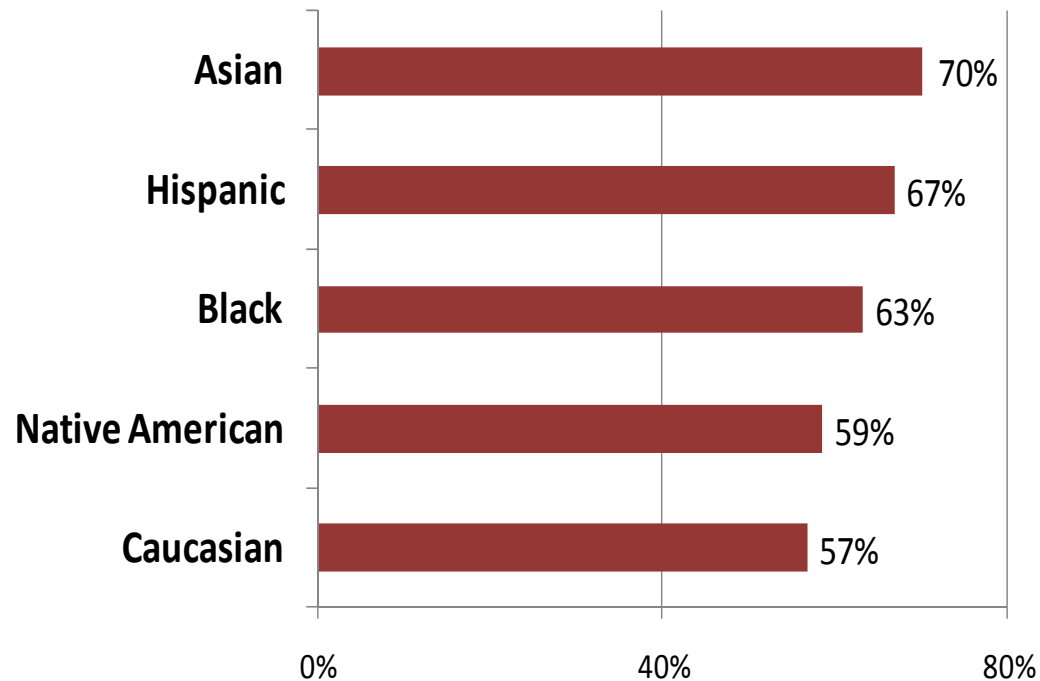
Seniors Reporting Concerns About the U.S. Economy Will “Greatly” or “Somewhat” Influence Their Application Schools



Socioeconomic status (SES) determined by reported family income, zip code analyses, financial aid application status, and other variables.

Influence of Concerns on Applications by Ethnicity

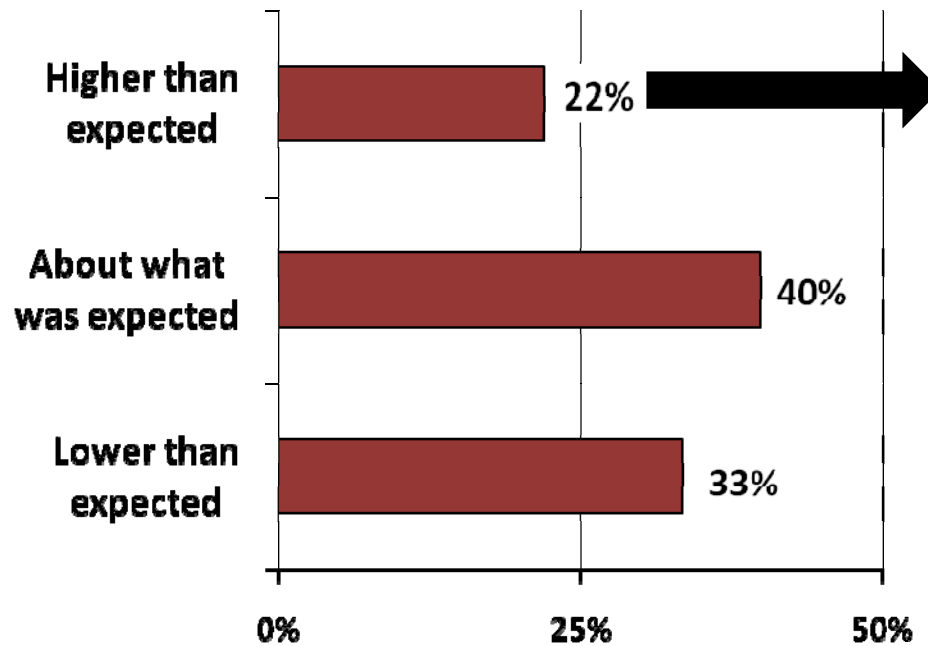
Seniors Reporting Concerns About the U.S. Economy
Will "Greatly" or "Somewhat" Influence Their Application Schools



Did this heightened concern among students of color result in lower enrollment numbers at your institution?

Comparison of Financial Aid to Expectations

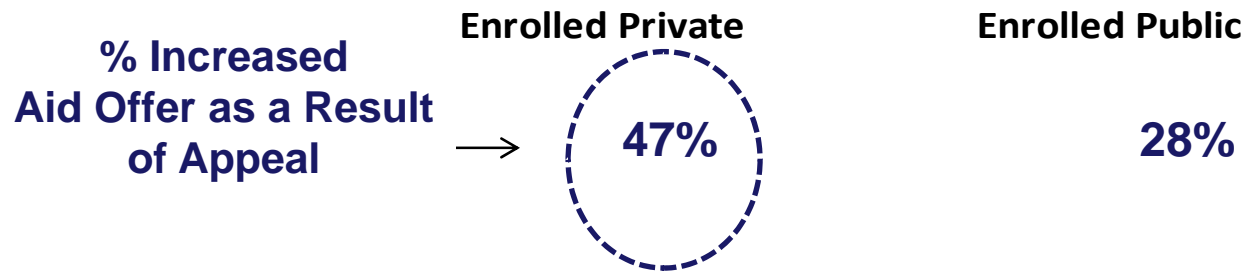
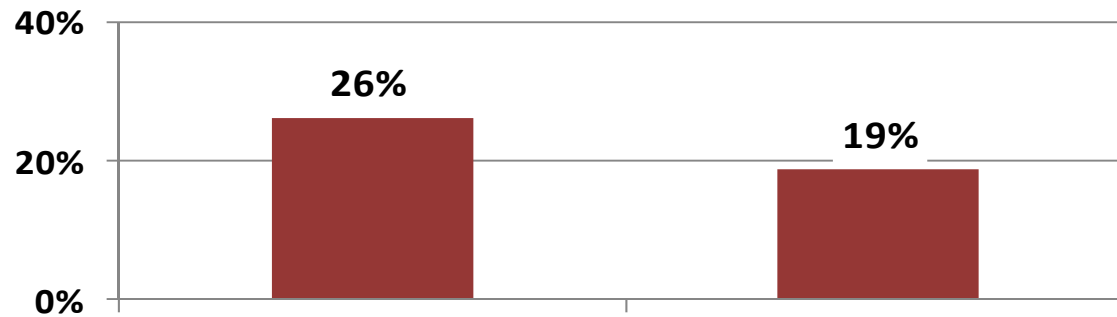
How Did Your Financial Aid Offer Compare to Your Expectations?



- More likely lower income/SES
- More likely to be an underrepresented minority group (esp. African American), but less likely to be Asian
- More likely to be enrolling at a private college or university
- Less difficulty in making enrollment school decision
- Number one reason for choosing enrollment school was 'scholarship/financial aid'

Aid Appeals

Proportion of Seniors Who Appealed Initial Aid Offer From Their Enrollment School



What has been the audience's experience with appeals this year?
What ethical concerns do we need to be considering?

Questions for the Audience

- ❖ To what extent what was the experience of your institution reflected in this data? Where did it differ?
- ❖ What early indicators are you seeing that provide insight into the health of your applicant pool and enrollment outlook this year?
- ❖ What are college counselors seeing at the high school level that could shed light on prospects for this coming year?
- ❖ How have you been able to maintain staff morale during a time of heightened work load and frozen salaries?



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