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Key Attitudes & Practices of Senior Level Enrollment Officials

Presented by

Chris Lucier, University of Vermont

Ned Jones, Siena College

Robert Mirabile, Maguire Associates

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Survey of Senior Enrollment Officials (SEOs)

❖ Research Audience

- Senior level enrollment/admissions officials at 4-year colleges/universities in the US (i.e., Dean/Director/VP level)
- Responsible for undergraduate admissions at the institution

❖ Methodology

- Email invitations to complete an online survey
- Data collection = February – March, 2008; June – July, 2009

❖ Survey Topics

- Enrollment management practices and policies
- Job satisfaction and attitudes about industry trends
- Respondent and institutional characteristics

❖ Survey Participation

- 2008 (n) = 461 (22% resp. rate); 2009 (n) = 380 (18% resp. rate)
- National composition; 1/3 public schools and 2/3 private schools

A Climate of Concern in Enrollment Management

- ❖ **“Experts say higher education will have to embrace new strategies if student financing is to hold up through the severe economic downturn”**
– *eSchool News*, October 14, 2008
- ❖ **“Tuition Is Up -- As Is Uncertainty”**
– *Inside Higher Ed*, October 30, 2008
- ❖ **“Small Private Colleges Freeze Hiring and Pay Increases in Favor of Student Aid”**
– *The Chronicle of Higher Education*, December 19, 2008
- ❖ **“Admissions Officials Anticipate a Spring of Uncertainty”**
– *The Chronicle of Higher Education*, January 16, 2009
- ❖ **“Hoping the Price is Right”**
– *Inside Higher Ed*, March 2, 2009



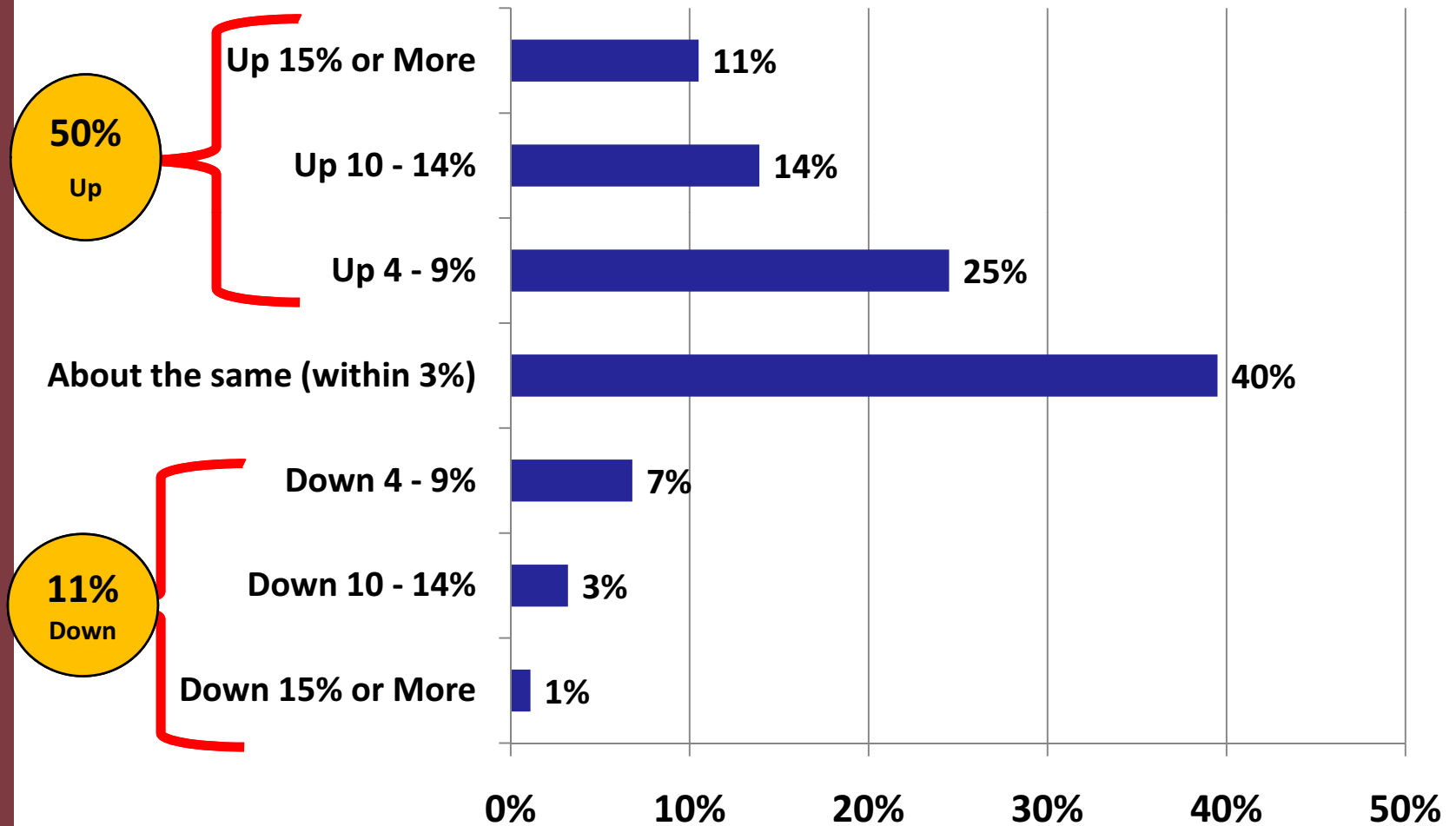
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How Did Key Enrollment Metrics Change in 2009?

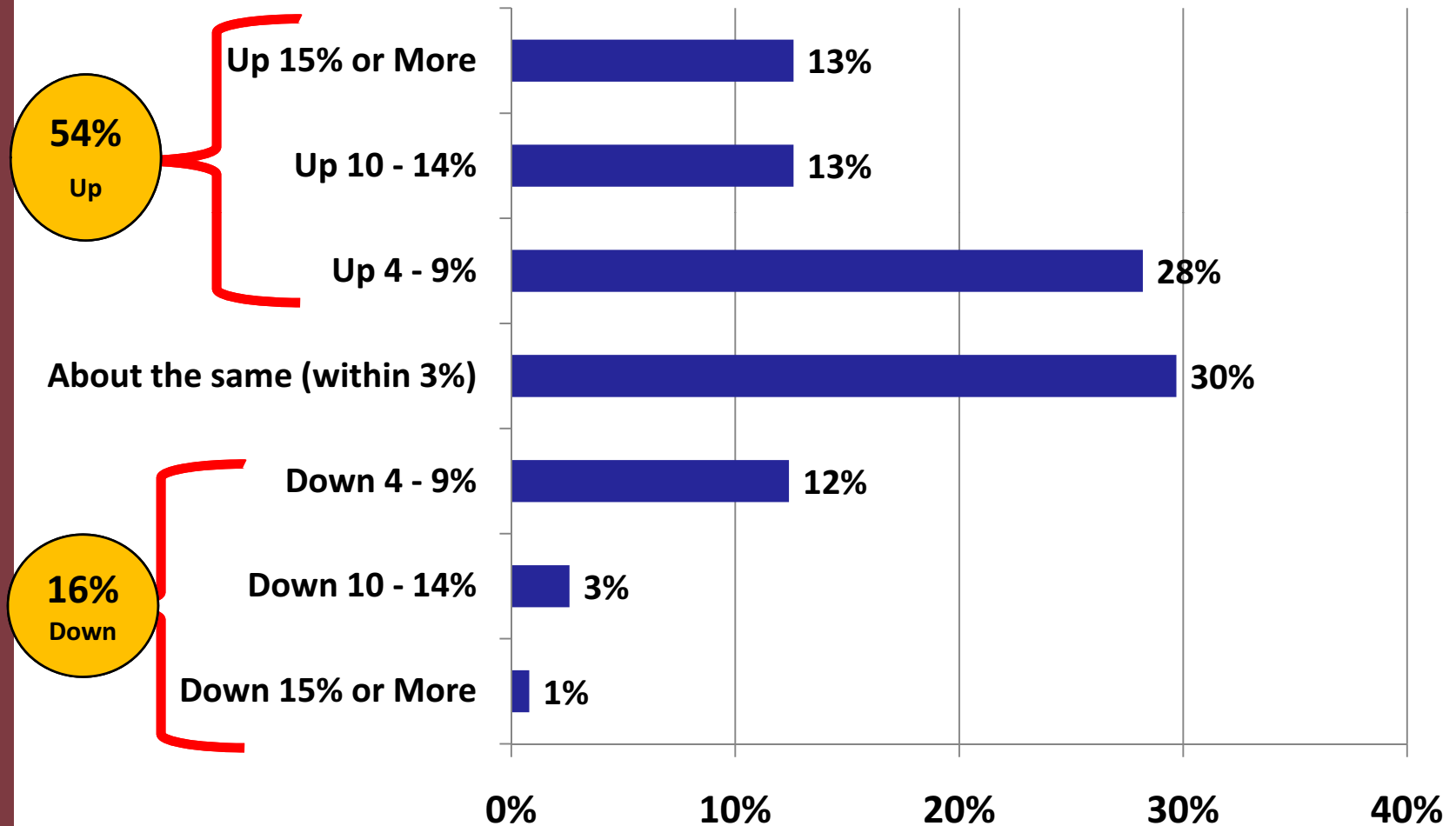
Change in Admission Inquiries: 2009 vs. 2008

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



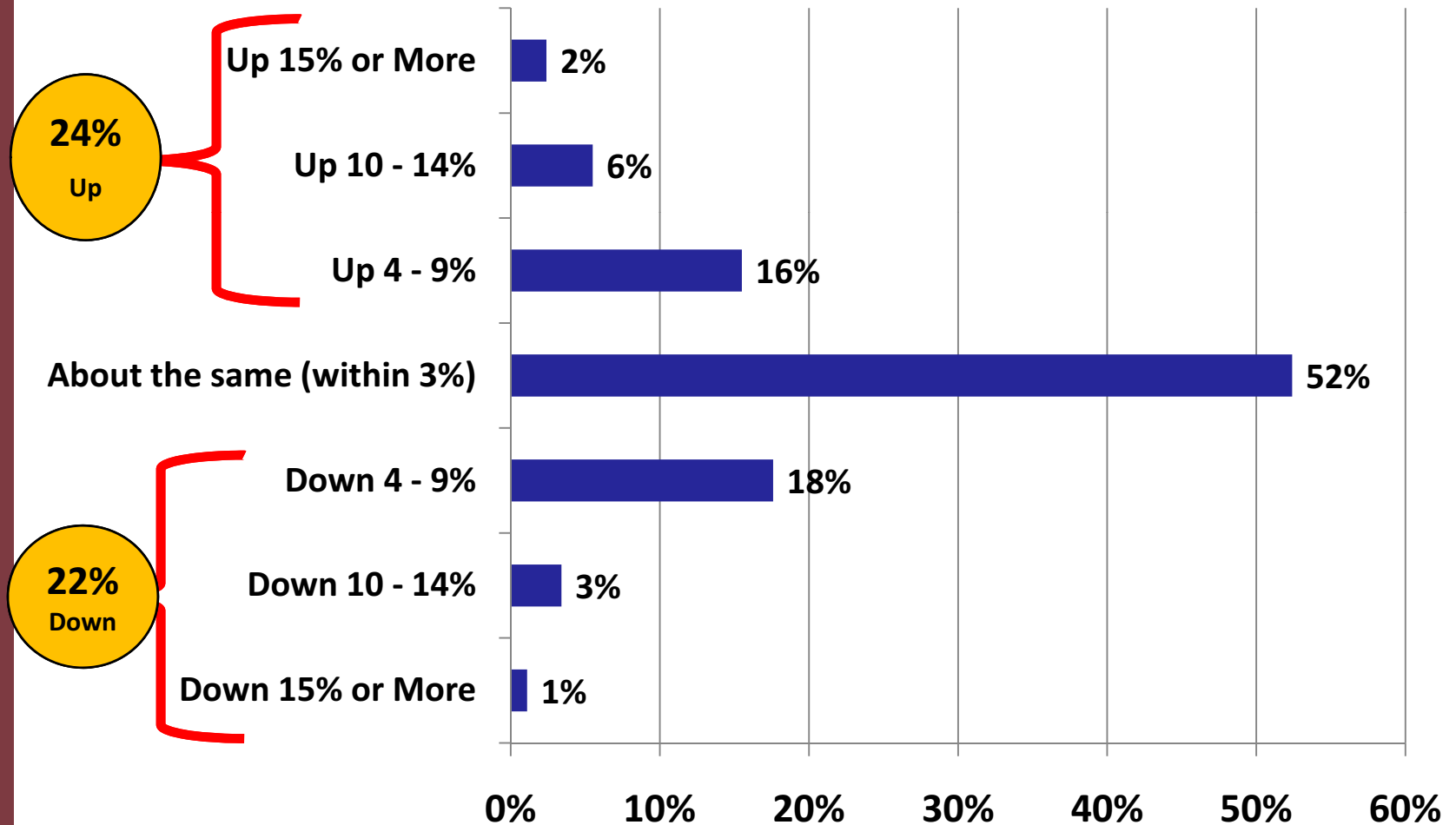
Change in Accepted Students: 2009 vs. 2008

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



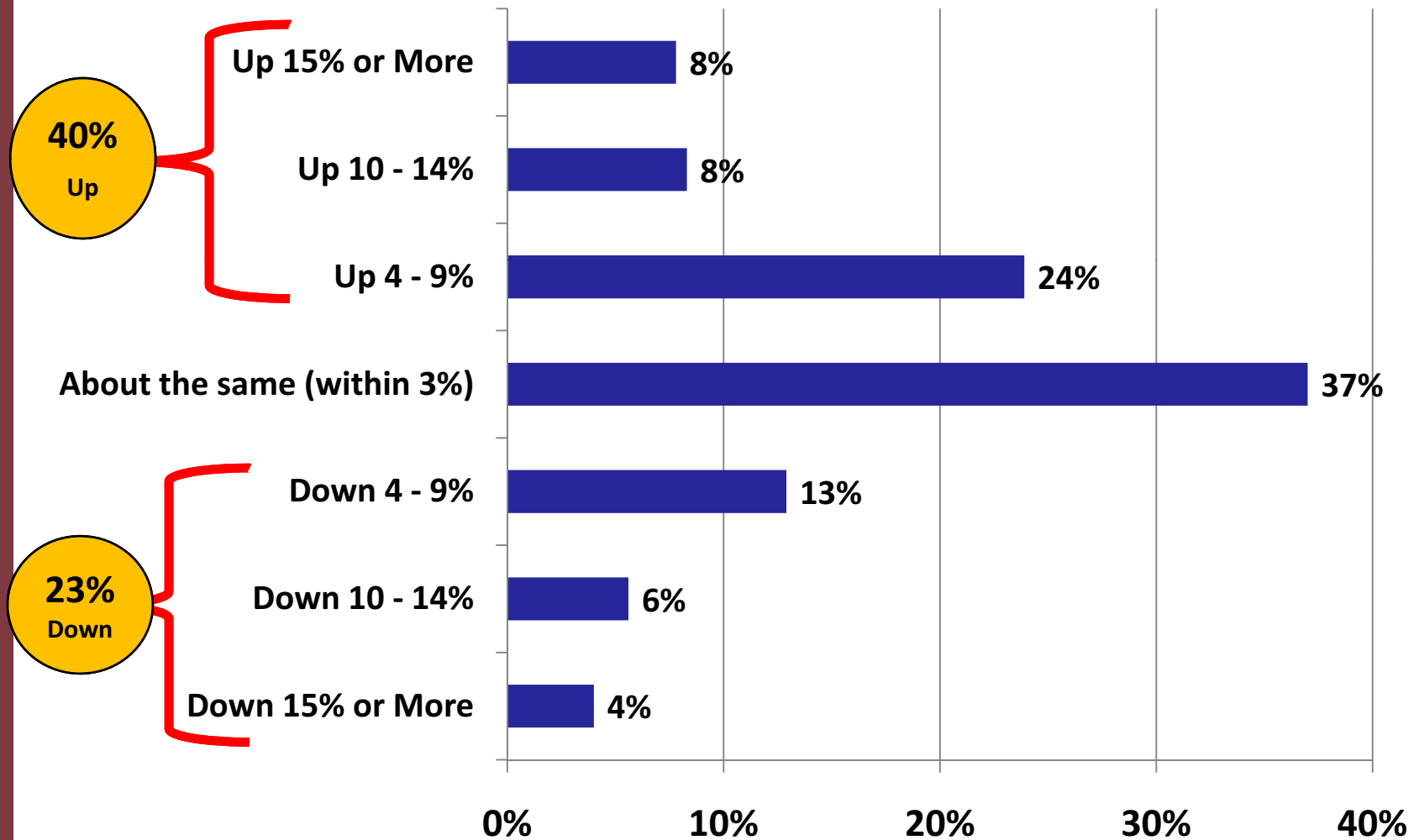
Change in Yield Rate: 2009 vs. 2008

Yield rates for the 2009 cycle are comparable to those of 2008.



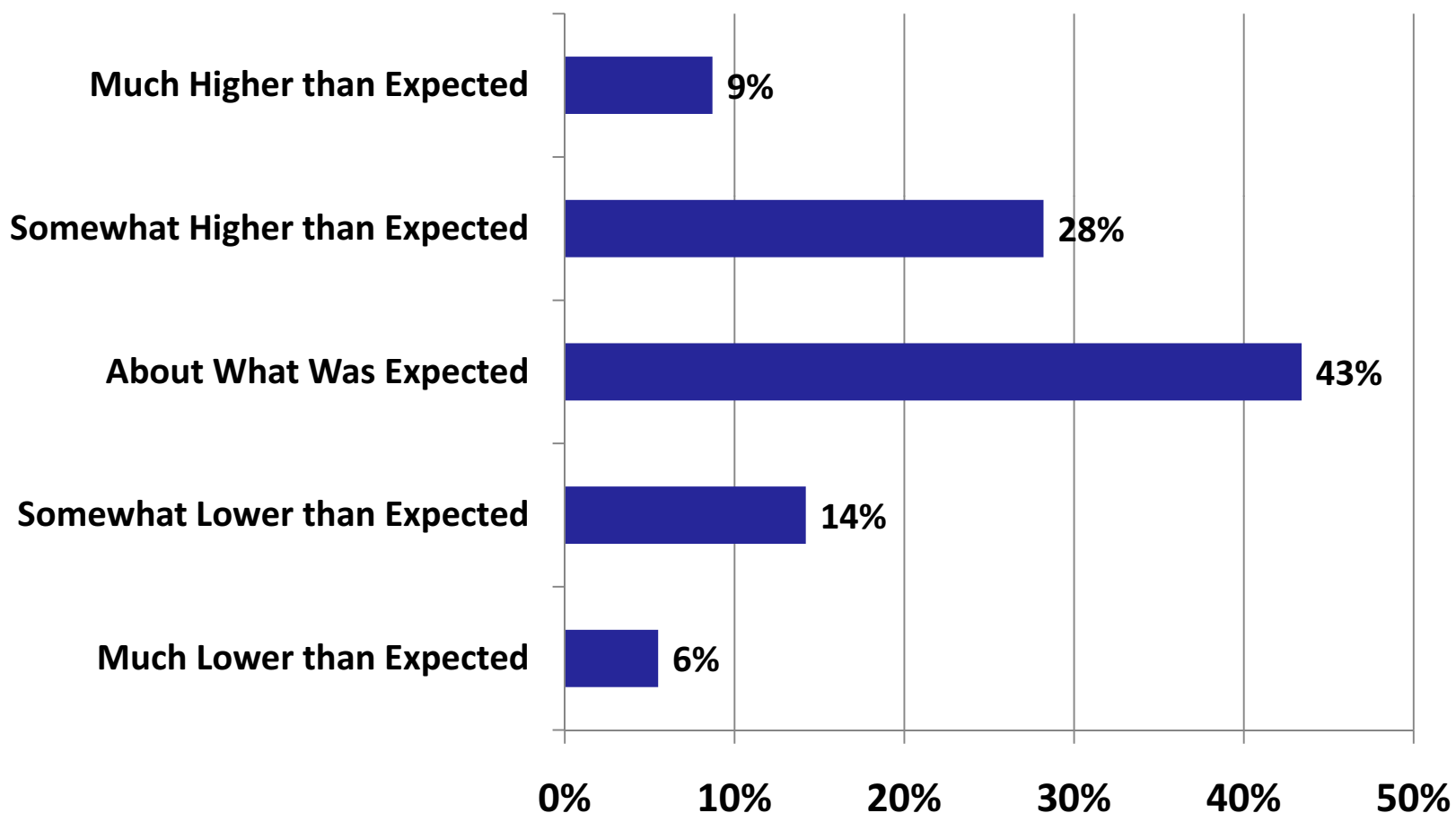
Change in Enrolling Students: 2009 vs. 2008

A higher proportion of respondents report enrollment gains than losses.



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 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% |



Qs: For each of the following [enrolling students], how do your school's Fall 2009 first-year totals compare to last year's? Which of the following best reflects the type of school at which you work?

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% |



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 total full-time undergraduate enrollment at your school?

Change in Enrolling Students by Discount Rate

Enrollment was strongest among schools with discount rates less than 30%.

| | 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% |



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 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 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?

Panelist Discussion Questions

- ❖ **Why are admission inquiries up? Is it a sign of higher market demand or just students conducting wider searches?**
- ❖ **How do you think the tendency of most schools to admit more students impacted enrollment at your school?**
- ❖ **These findings suggest most schools had fairly successful years. Do you think concerns to the contrary were overstated?**
- ❖ **How do you think trends in inquiries, accepts, yield, and enrollment will change next year and longer term? Do you think we have “seen the bottom” from an enrollment management perspective?**



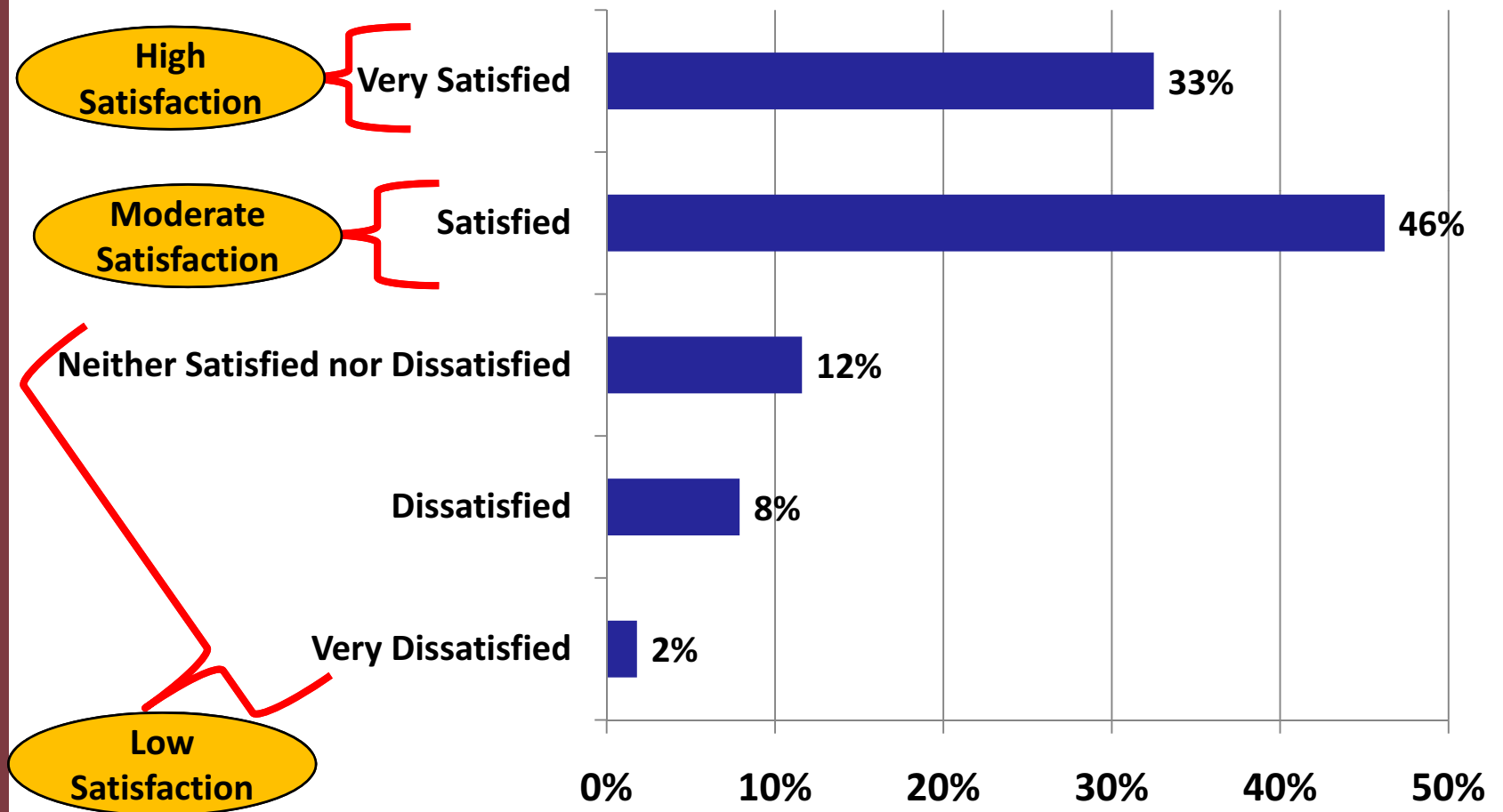
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What Factors are Most Closely Tied to Enrollment Satisfaction?

Overall Satisfaction with Fall 2009 Enrollment Efforts

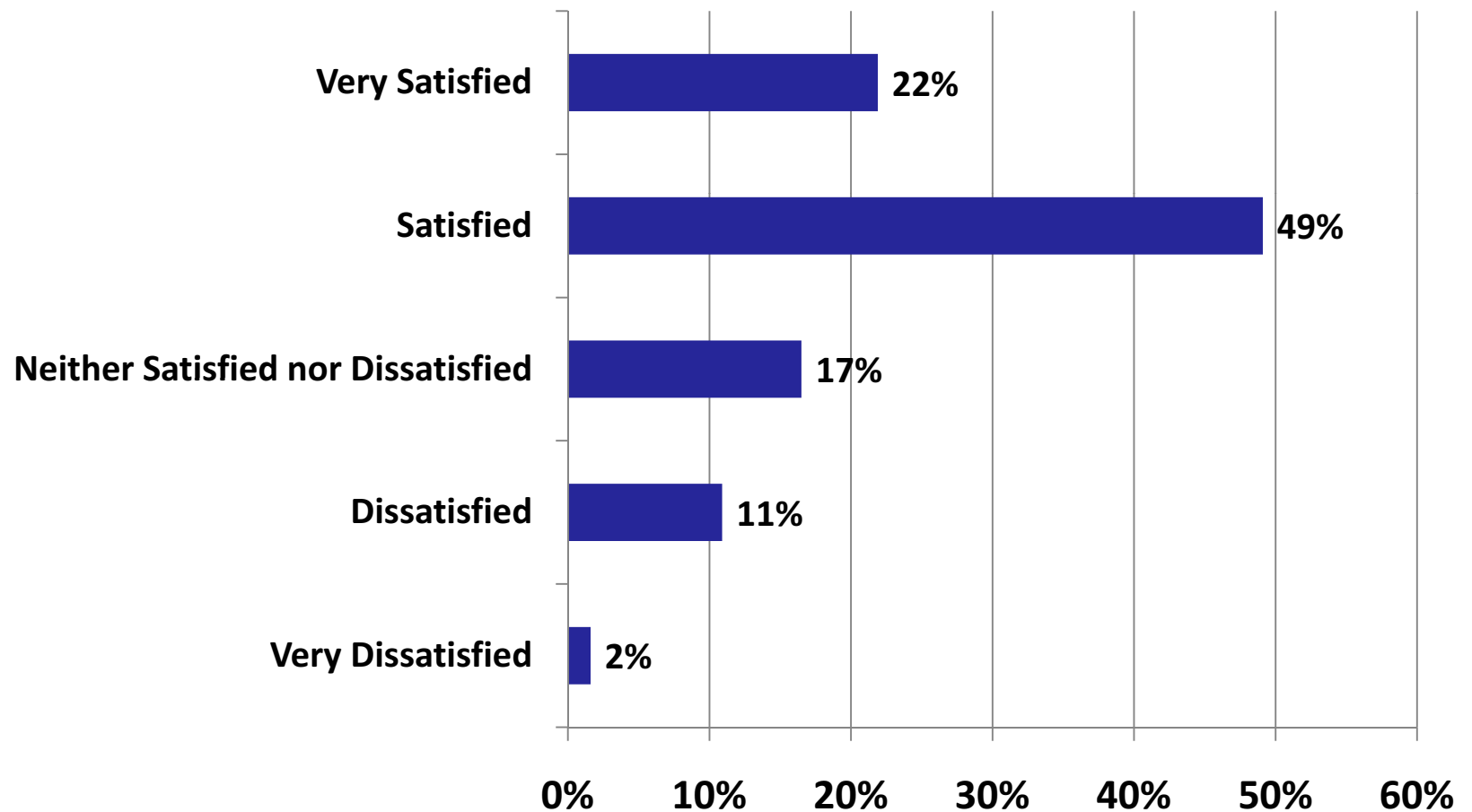
The vast majority of SEOs are 'satisfied' or 'very satisfied' with the enrollment efforts of their institutions for fall 2009.



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

Satisfaction with Institutional Response to Economic Downturn

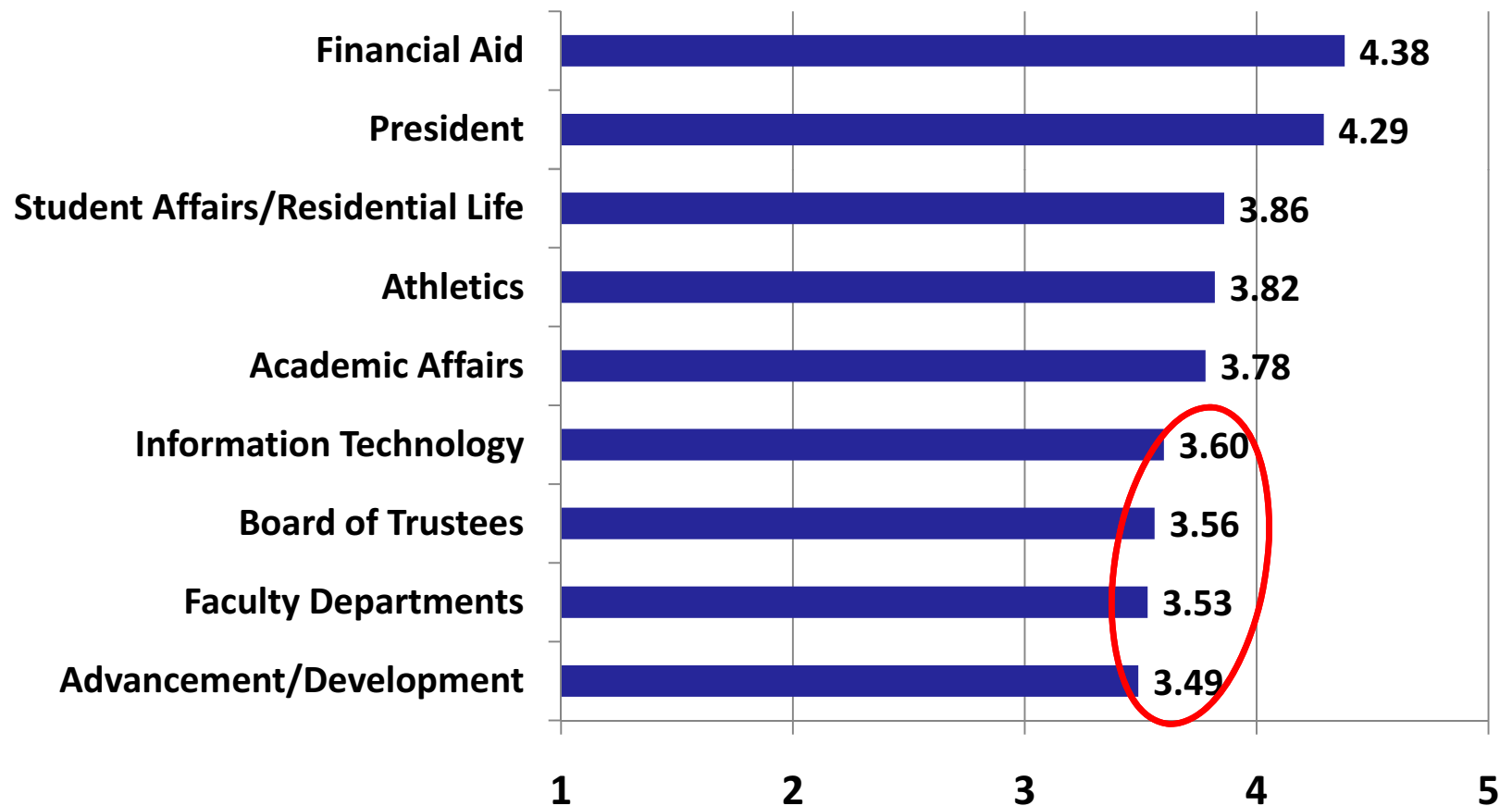
Likewise, most SEOs are 'satisfied' or 'very satisfied' with how their institutions responded to the economic downturn.



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)**

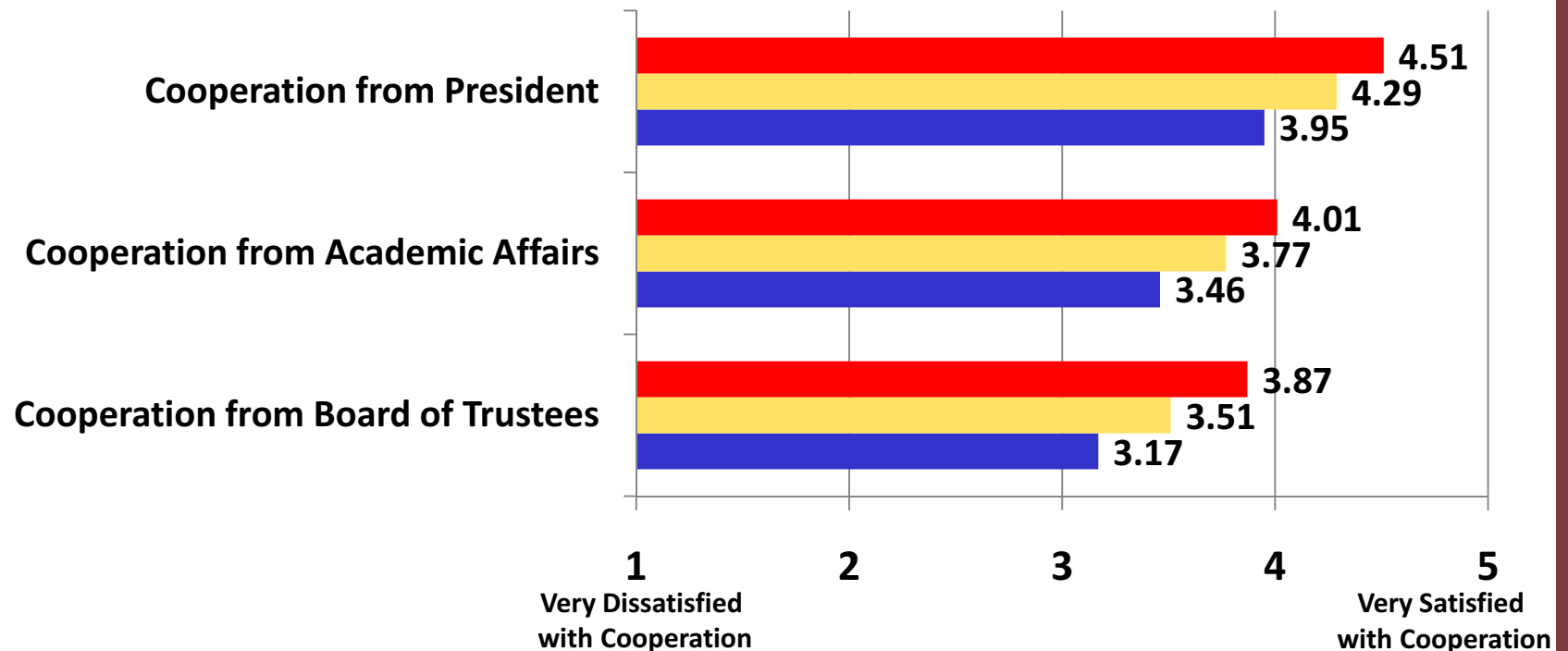
Cooperation Differences by Enrollment Satisfaction

Overall enrollment satisfaction is linked to strong relationships between undergraduate admissions and the president, academic affairs, and board of trustees.

■ High Enrollment Satisfaction

■ Moderate Enrollment Satisfaction

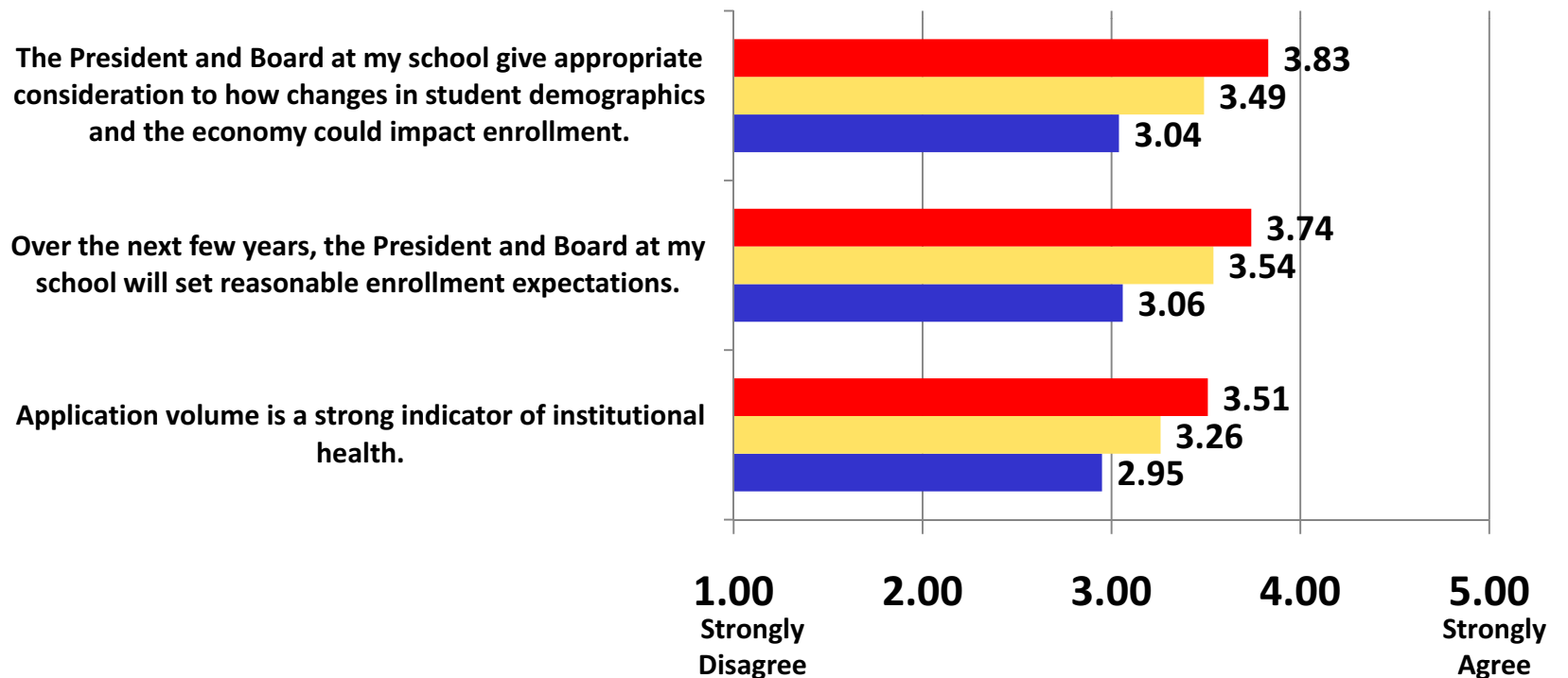
■ Low Enrollment Satisfaction



Attitudinal Differences by Enrollment Satisfaction

SEOs who are highly satisfied with fall 2009 enrollment efforts show stronger alignment with their presidents and boards than those who are less satisfied; they also put more stock in application volume.

■ High Enrollment Satisfaction ■ Moderate Enrollment Satisfaction
■ Low Enrollment Satisfaction



Qs: All things considered, how satisfied are you with your institution's undergraduate enrollment efforts for Fall 2009? Please indicate the extent to which you agree or disagree with the following statements.

Panelist Discussion Questions

- ❖ **Why do you think cooperation satisfaction with financial aid and presidents is so high?**
- ❖ **Why do you think cooperation satisfaction with IT, boards, faculty, and advancement is relatively low?**
- ❖ **Did any of the factors associated with enrollment satisfaction surprise you? What do you think is missing from this group?**
- ❖ **What do you think are important factors in having strong relationships between undergraduate admissions and the President? How about with the Board of Trustees?**



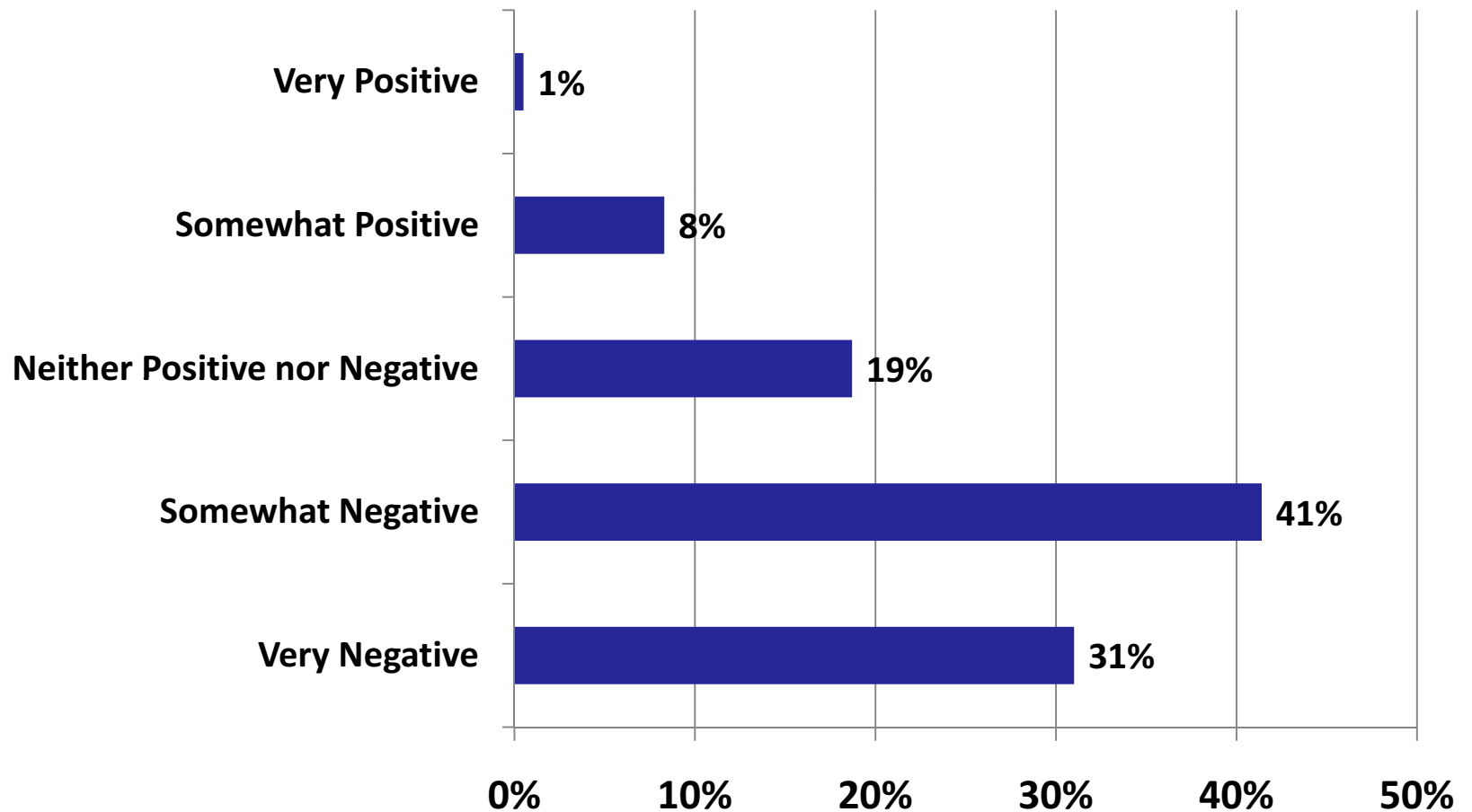
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How Are SEOs Responding to the Changing Marketplace?

Short-Term Economic Expectations

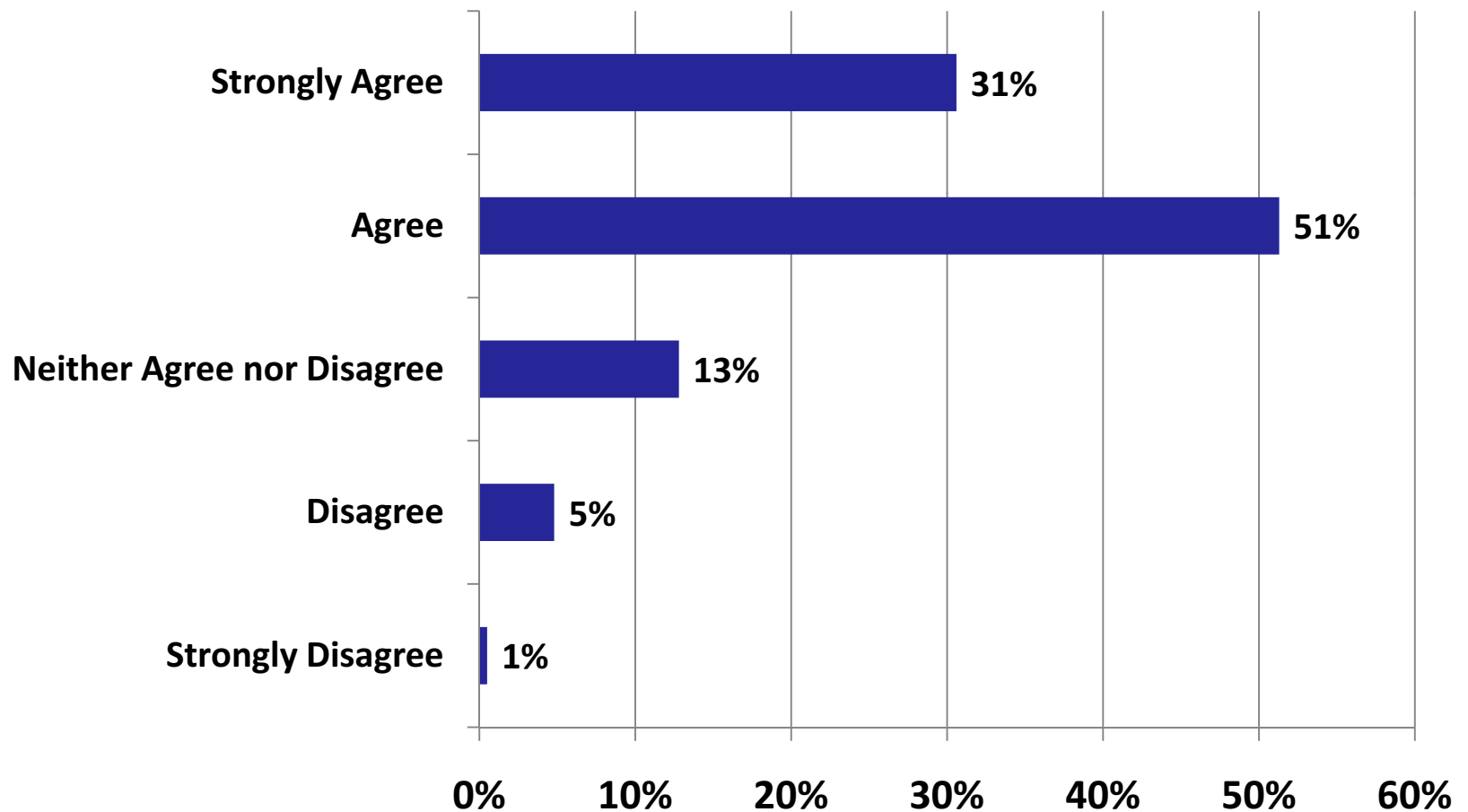
Nearly all SEOs are cynical toward the possibility of economic recovery in the short-term.



Q: How positively or negatively do you feel about each of the following [The likelihood of substantial economic improvement in your state within the next year]?

Does Your Admissions Office Work Harder Each Year to Produce Similar Enrollment Results?

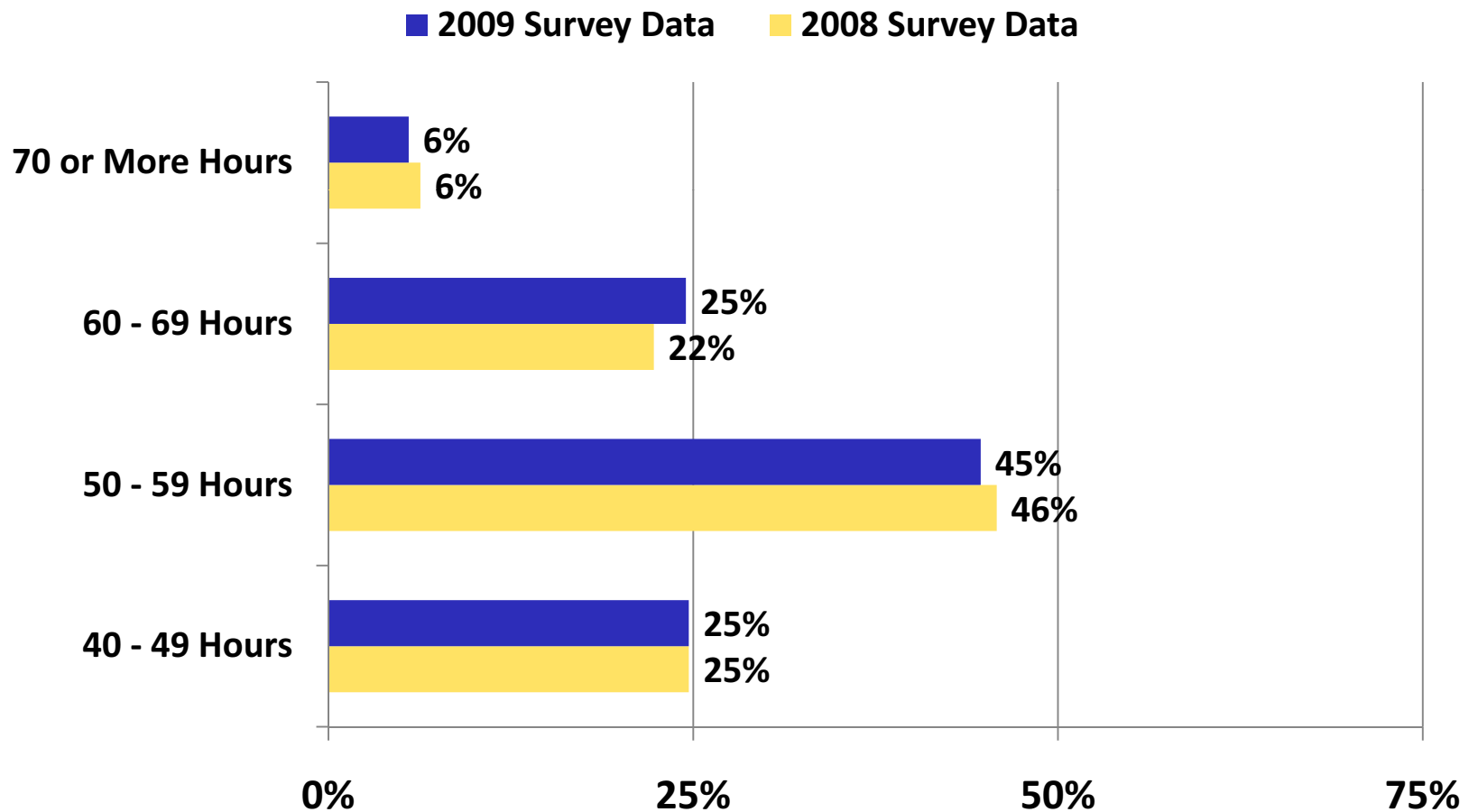
The vast majority of SEOs agree with the idea that their offices have to work harder each year to maintain similar enrollment results.



Q: Please indicate the extent to which you agree or disagree with the following statements [Our admissions office has to work harder each year to produce enrollment outcomes equal to those of the recent past.]?

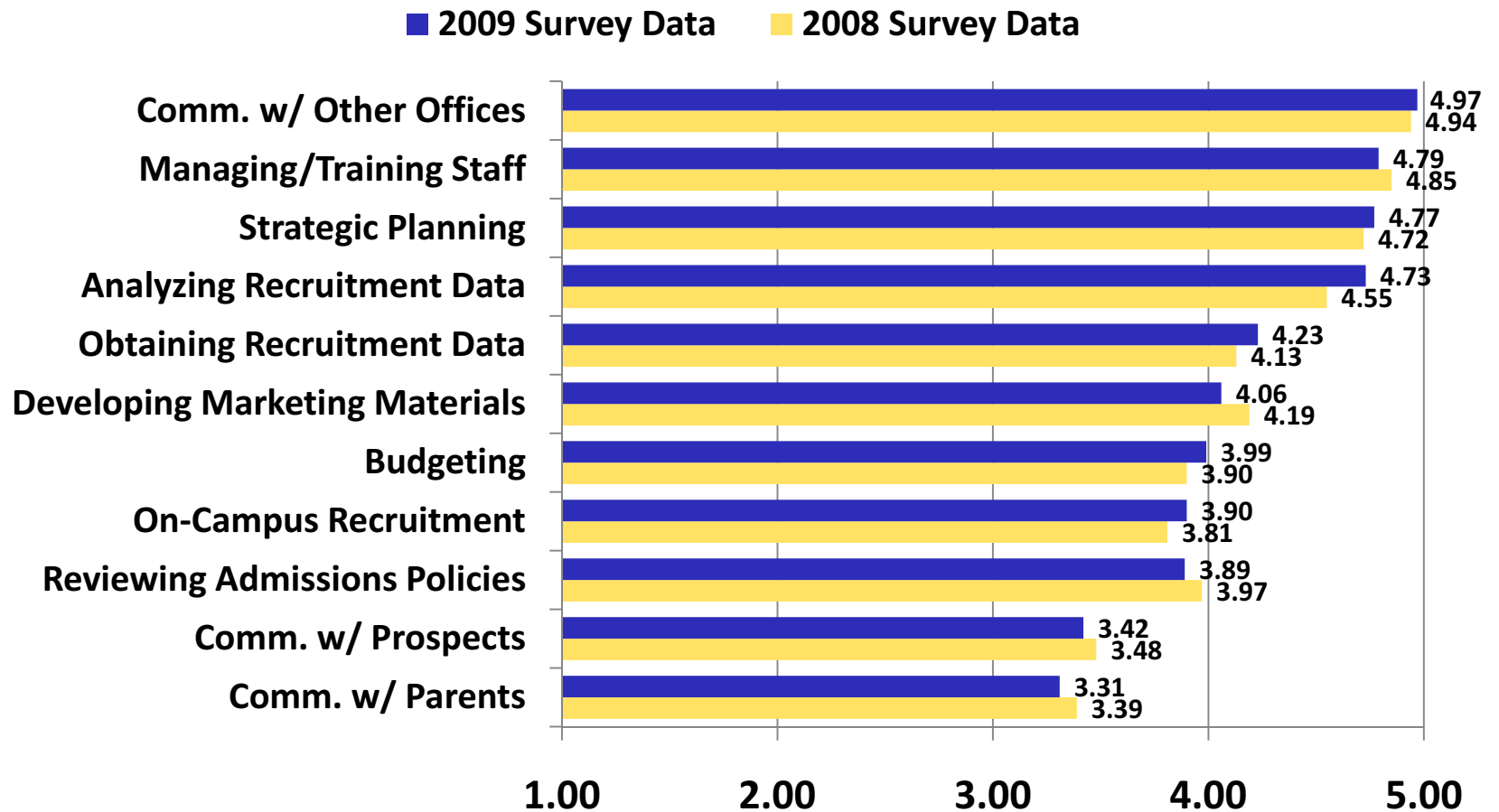
Number of Hours Worked Each Week by SEOs

As in 2008, most SEOs work between 50 and 70 hours per week in 2009.



Amount of SEO Work Time by Activity Type

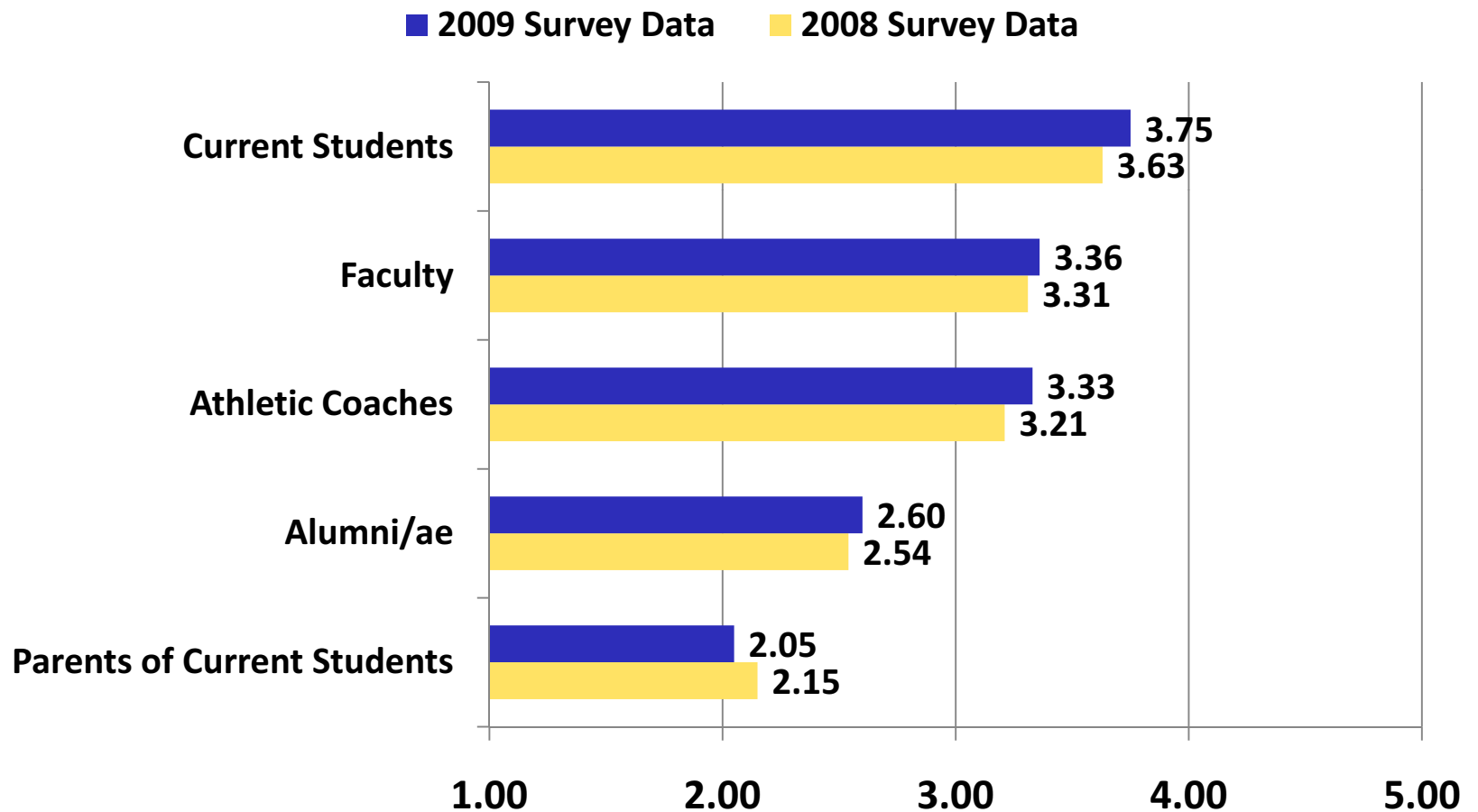
In both 2008 and 2009, SEOs spent much of their time communicating with other offices, managing staff, planning strategy, and analyzing recruitment data.



Q: How much of your work time is devoted to the following activities?
Scale: 1 (None) to 5 = (Very High Amount).

Constituent Engagement in Recruitment

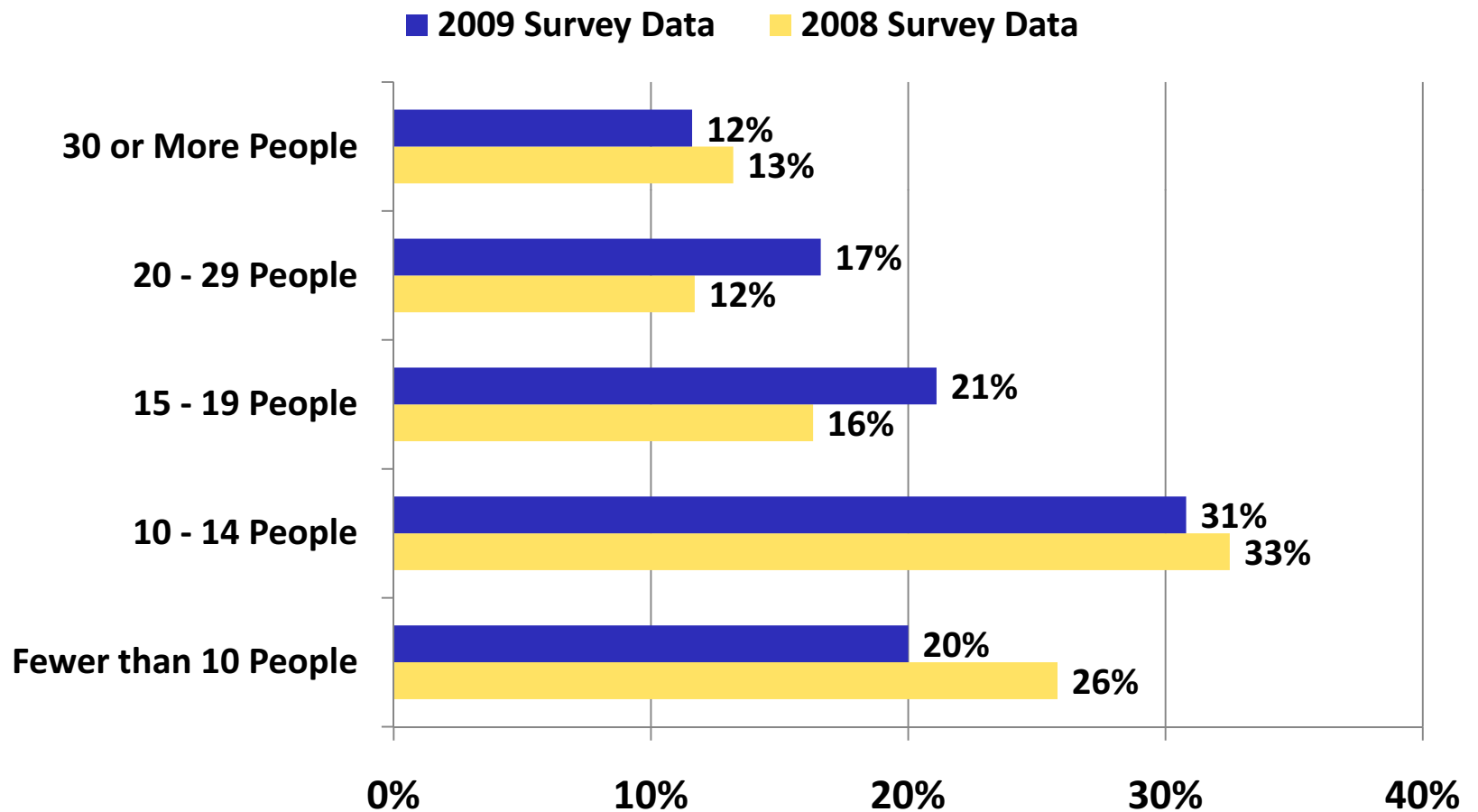
Aside from current students, SEOs continue to leverage key constituencies in recruitment only moderately or slightly.



Q: To what extent does your office engage the following groups in undergraduate recruitment?
Scale: 1 (Not at All) to 5 = (Very Much).

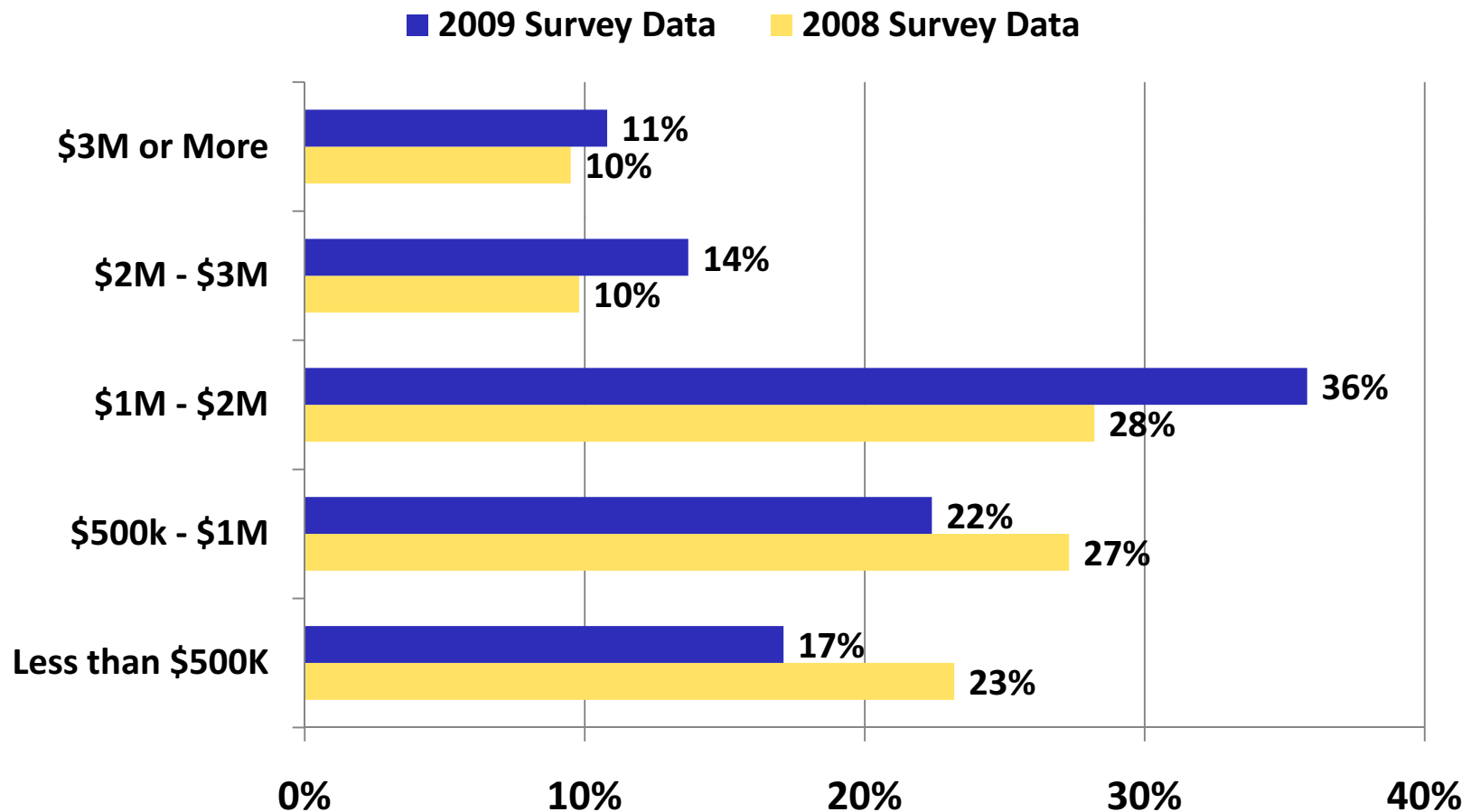
Size of FT Staff in Undergraduate Admissions

Staff sizes appear slightly larger in 2009 than in 2008.



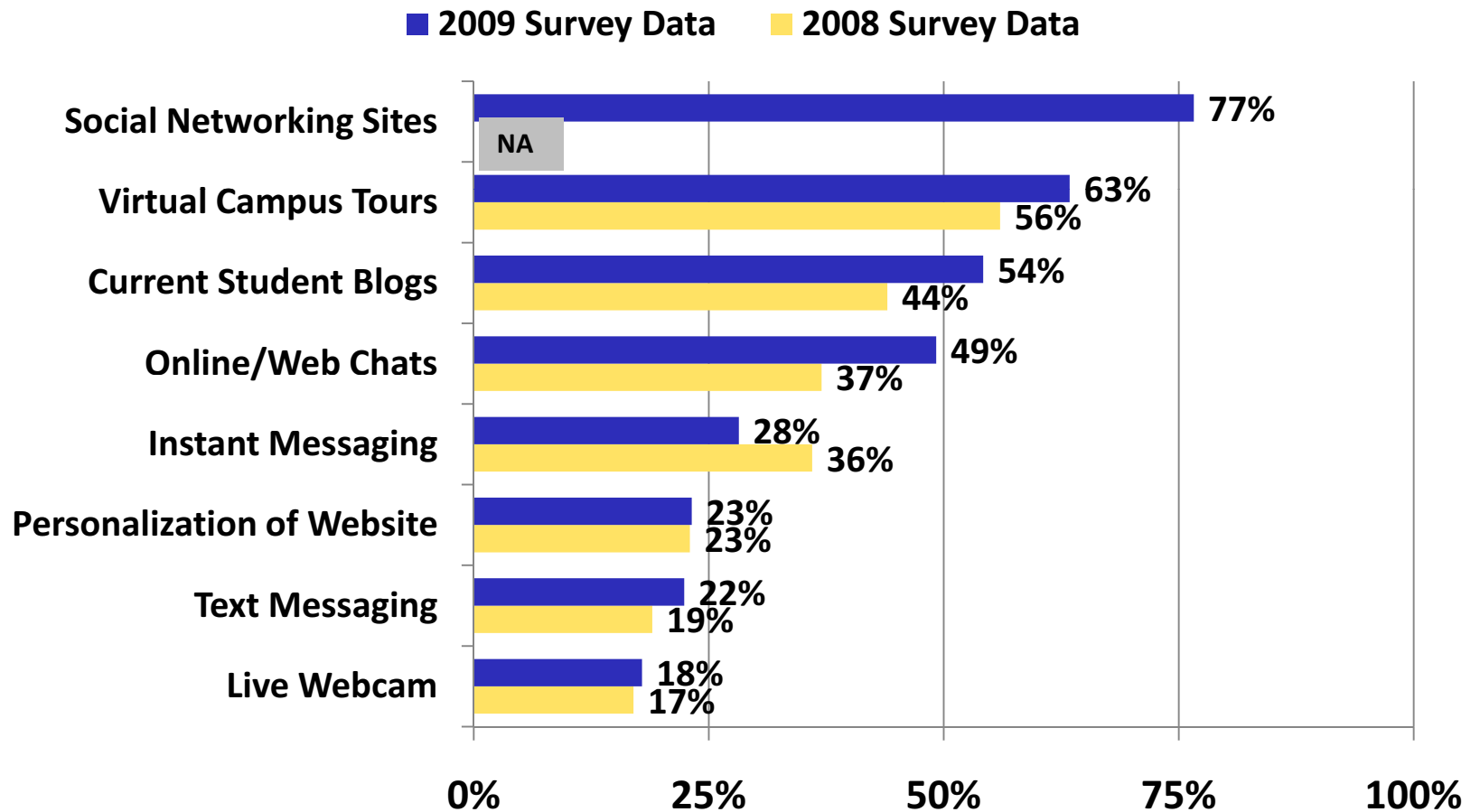
Size of Undergraduate Admissions Budget

Likewise, admissions office budgets have tended to increase in 2009.



Use of New Technologies in Admissions

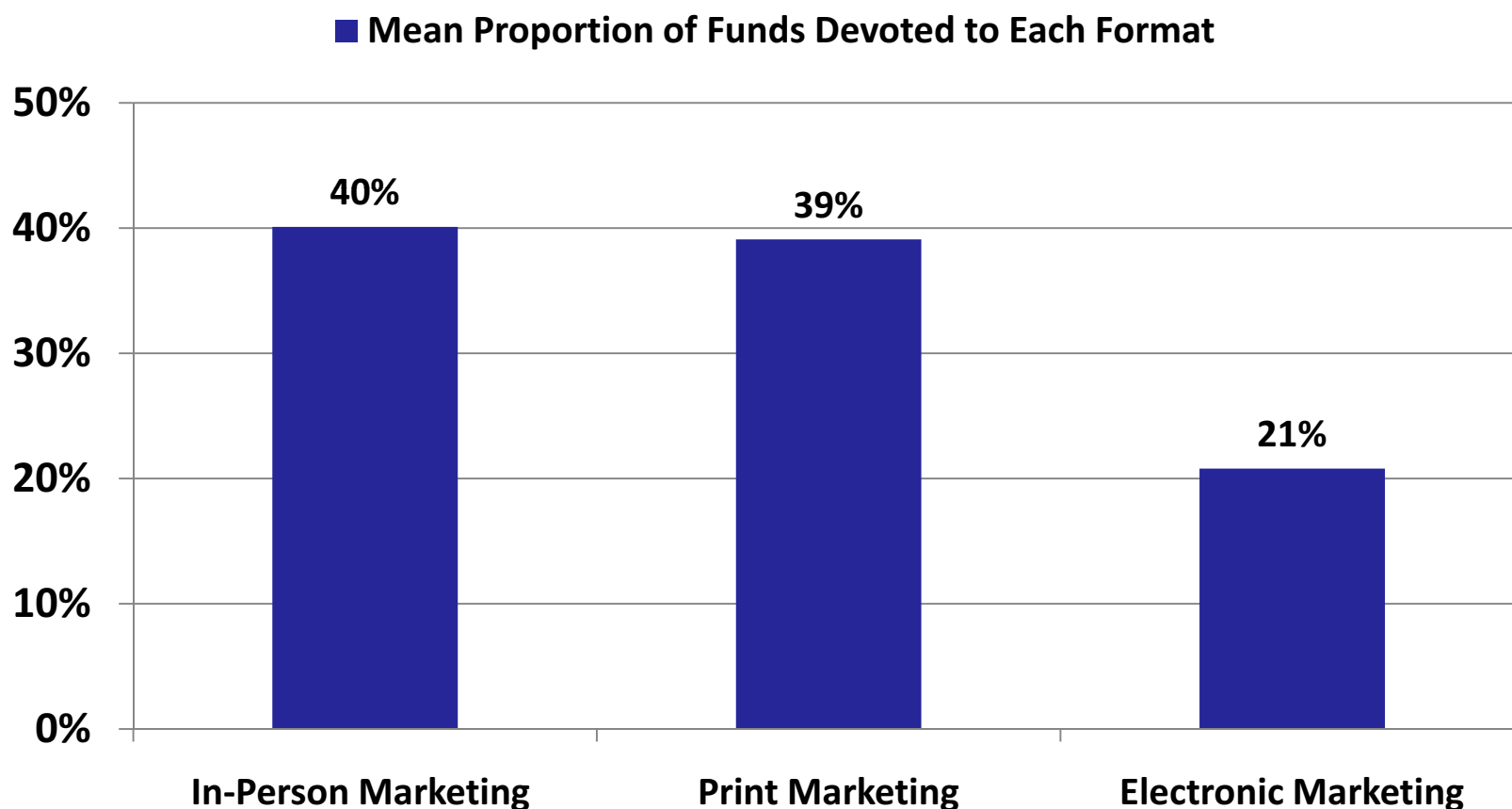
The proportion of schools using virtual campus tours, current student blogs, and online/web chats is growing.



Q: Which of the following electronic/web-based tools does your office actively employ in undergraduate recruitment and communications? (Please select all that apply.)

Percentage Spent on Each Type of Marketing

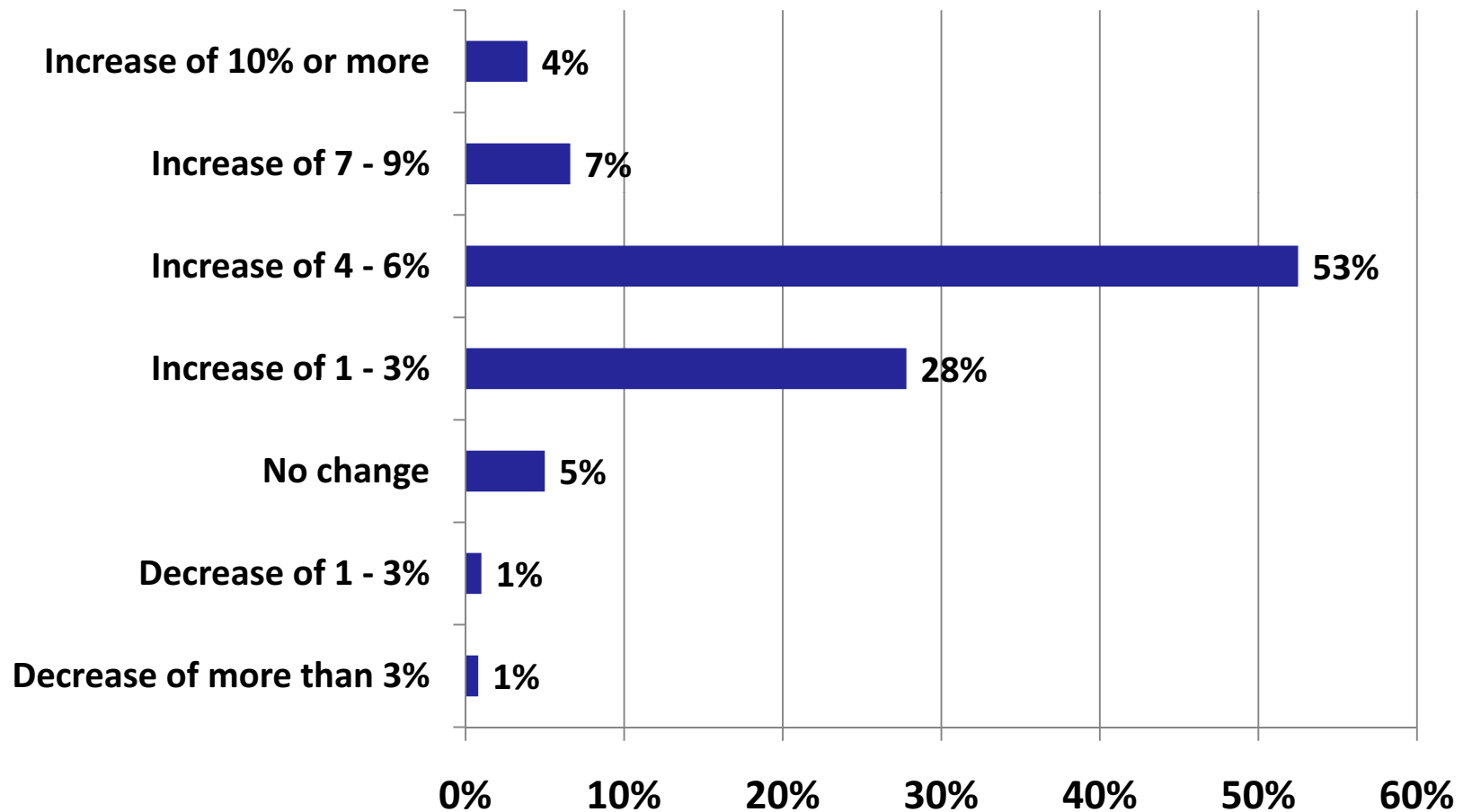
Despite the increased use of electronic tools in undergraduate recruitment, the average proportion of funds is much higher for in-person and print marketing.



Q: Out of all the funds spent by your school on print, electronic, and in-person marketing for Fall 2009 undergraduate enrollment, approximately what proportion was devoted to each format? (note: total much sum to 100%)

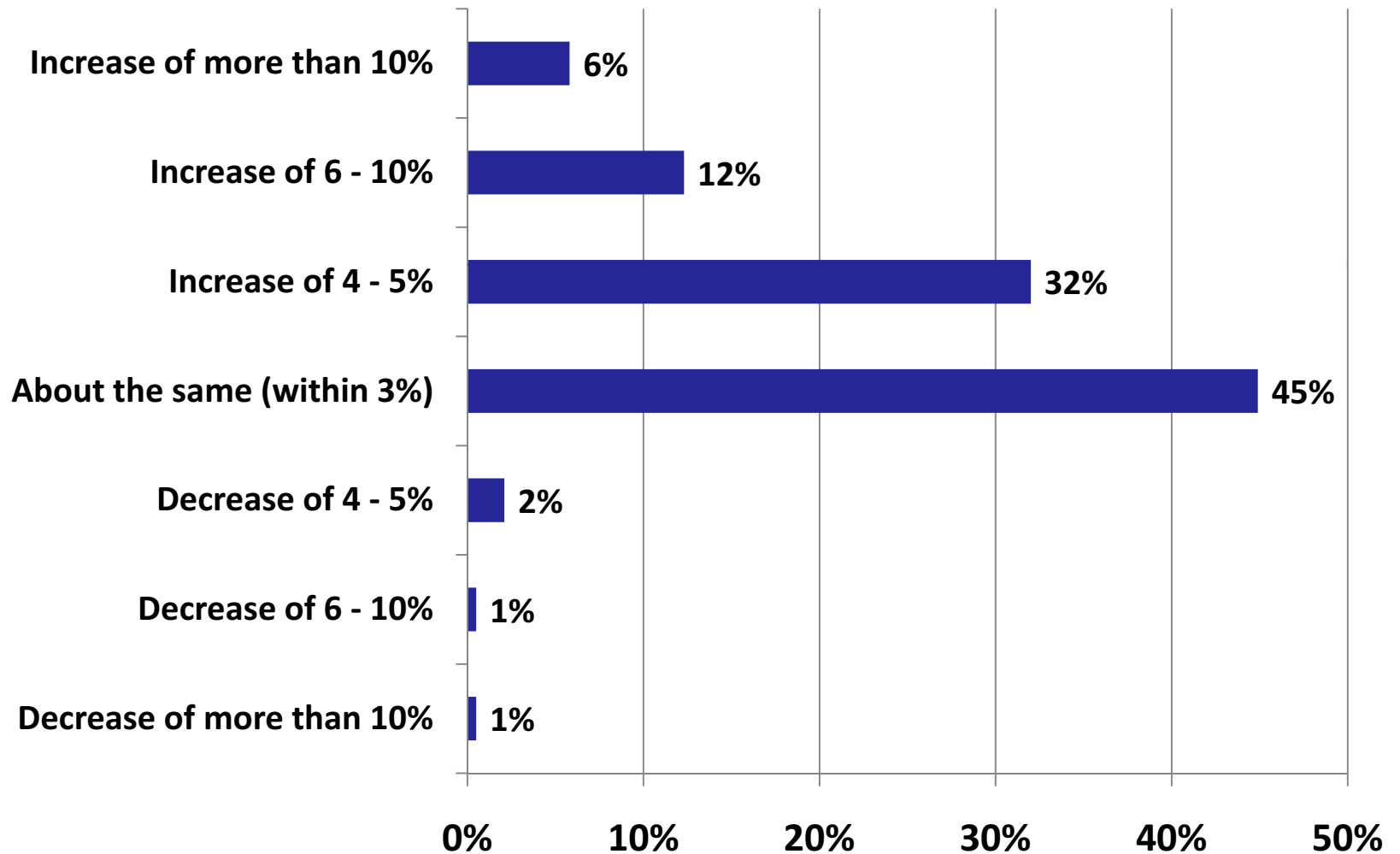
Change in Cost of Attendance: 2009 vs. 2008

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



Change in Financial Aid Allocation: 2009 vs. 2008

About half of schools increased their financial aid allocations.



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% |



Qs: 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?

Panelist Discussion Questions

- ❖ **How do you think the fall 2010 enrollment cycle will be similar or different from the fall 2009 cycle?**
- ❖ **Where is the greatest drain on the time of you or your staff that you wish could be fixed?**
- ❖ **Why aren't alumni leveraged more frequently in student recruitment?**
- ❖ **What do you think are the longer term implications of rising financial aid allocations by private schools?**



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