



Strategic Financial Aid Modeling

Advancing Higher Education Through Insight and Innovation

The Enrollment Management Forecast Analysis System (EMFASYS™) enables colleges and universities to maximize the strategic use of their institutional grant aid.

EMFASYS is a powerful predictive modeling system that helps clients apply institutional grant aid and scholarship funds strategically, shape the size and academic quality of entering classes, and enhance net total revenue. Our modeling processes use multivariate analysis that enables clients to quantify the consequences of different pricing and financial aid decisions under consideration. As a comprehensive planning tool, EMFASYS lets institutions proactively shape opportunities for growth and change among many rapidly shifting challenges.

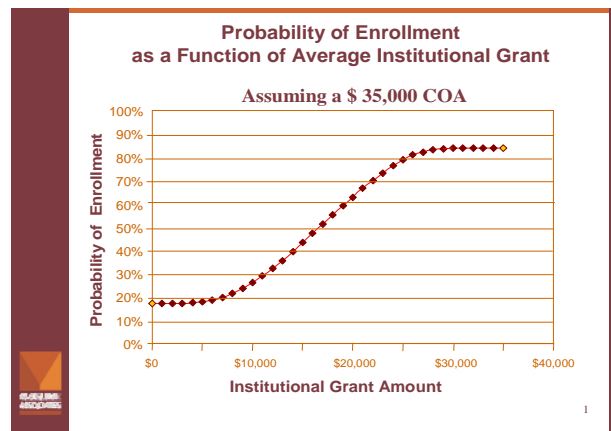
Flexible Approaches

An EMFASYS engagement generally evolves in three stages:

Modeling - We work with a designated campus team to prepare a database of admitted students from the last two years for analysis using an EMFASYS statistical model. This determines which factors are statistically relevant to predicting enrollment for your institution.

Goal Setting - We pose “what if” questions to evaluate varied institutional grant-packaging strategies and their likely impact on variables such as academic quality, net tuition revenue, yield, and class composition. This enables you to shape a realistic set of enrollment goals and an institutional aid budget of maximum benefit to your institution and its stakeholders.

Awarding & Monitoring - You can select from two awarding approaches. For Option 1, we create customized awarding rules that you can apply to optimize your use of institutional aid. We build into the model specific funding guidelines that your institution elects to use for the current year’s awarding. We prepare a set of detailed matrices that you can use to allocate the grant portion of need-based and merit aid for the entering class.



Most clients select Option 2 where individualized price-point awards are created for every admitted student. You send the relevant data for admitted students through a secure FTP site as often as desired during the awarding process and we promptly return the appropriate individual grant awards. The Financial Aid Office then packages awards and other external aid sources for distribution to students.

Unlike other offerings that merely identify those students most likely to enroll, EMFASYS gives you tools for specifically shaping your incoming class as desired. It provides a reliable forecast of likely outcomes months in advance of a recruitment cycle. We also deliver regular status reports of updated enrollment projections with details about the variables you have deemed important. In this context, you always know how well your institution is meeting enrollment goals and anticipating likely outcomes.

Widespread Utility

This methodology delivers value at all levels of the institution, enabling:

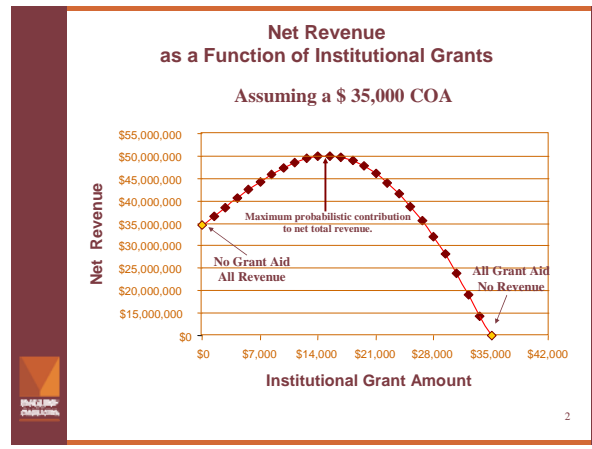
- *Presidents, academic officers, and senior administrators* to develop effective strategic plans by weighing in advance the trade-offs among different sets of enrollment goals,

- *Enrollment management officers* to sculpt and deliver enrollment numbers, quality, diversity, geography, and other key criteria for incoming classes,

- *Financial aid officers* to maximize the positive impact of institutional grant awards, and

- *Chief financial officers* to generate additional tuition revenue to be invested in faculty, facilities, infrastructure, and the fiscal health of the institution.

By design, EMFASYS engages leadership across the institution in strategic goal setting and decision making, creating opportunities for the admissions, enrollment management, and financial aid teams to apply new planning and analysis tools with greater self-sufficiency.



Deliverables

EMFASYS provides clients with analysis and recommendations that help to:

- Identify the key drivers of enrollment for a particular mission,
- Examine the interaction of a wide range of current policy and financial options related to enrollment goals,
- Project the effects of institutional grant aid allocations on enrollment goals, net tuition revenue, and institutional aid budgets,
- Make informed trade-off decisions to set aggressive but achievable enrollment and financial goals,
- Distribute institutional funds in ways that help achieve those goals, and
- Customize tracking reports and outcome projections throughout the cycle.

