ENROLLMENT MANAGEMENT AND BIG DATA

in an Era of Change

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Executive Summary

For most colleges and universities across the United States, shifting demographic and market trends keep raising the bar for student-recruitment goals. In many states, colleges are competing more fiercely than ever for a shrinking pool of high-school graduates. With state appropriations for higher education stagnant or in decline, many public institutions have been forced to increase their tuition—and tuition revenue is more essential at a time when parents and students are raising pointed questions about the fundamental value of college and its potential return on investment. In private institutions, the estimated average institutional tuition discount rate stands at a record 49.1 percent. Meanwhile, domestic political realities are currently impeding the ability of U.S. institutions to compete for a share of the international demand for higher education.

On campus, these issues collide in the offices of admissions and enrollment management, making professionals in those roles the point people, in many respects, for their institution's response to a complex set of economic and demographic challenges. And because student enrollment is the heart of the economic engine that drives universities that do not have large endowments or research grants, the role of those professionals has never been more important—or, perhaps, more stressful.

To better understand those challenges, The Chronicle of Higher Education collaborated with Maguire Associates in April 2017 to conduct a survey of trends in enrollment management and admissions in colleges and universities.

The survey of nearly 350 enrollment managers and admissions staff shows that while many institutions met or exceeded important admissions goals in select areas (e.g., application volume and recruitment of low-income, male, and diverse students), softness in other critical areas may be cause for concern. For example, more than a third of respondents (37 percent) said their institution had not met its goals for net revenue for 2017, versus 27 percent of institutions in a similar survey in 2015. Similarly, 38 percent of institutions did not meet their goal for total headcount, versus 27 percent in 2015. Perhaps reflecting the raised stakes for enrollment management today, most respondents also reported that their institution had increased its goals for net revenue, total headcount, yield, and application volume in 2017, a pattern that we also saw in surveys in 2014 and 2015.

This year, almost one-quarter of institutions will accept more applications from their wait lists than they did last year. Institutions have increased their goals for recruiting low-income students, but have backed off previous years' aspirations for increasing the number of international students. In terms of financial-aid strategies, we saw a significant drop in institutions using merit aid to shape their incoming first-year class.

Enrollment managers say their top challenges are allocating scarce resources, establishing or maintaining an enrollment-focused culture in the institution, and managing technology. Perhaps suggesting that more cabinet-level administrators are engaged in meeting enrollment goals, however, there was a significant drop between 2015 and 2017 in respondents who said "working with academic affairs" was a key challenge.

As busy professionals, enrollment managers find it difficult to pack all the activities that they need to accomplish into a given day's work. But unfortunately, that may be at the expense of some vital tasks. For example, two-fifths of respondents said they spend too little time communicating with parents of prospective enrollees. Well over a third said they spend too little time gathering and analyzing recruitment data. Nearly half of respondents said they don't spend enough time on strategic planning.

The survey shows that while nearly all enrollment professionals still use print materials to reach prospective students, they also rely about as much on digital communications channels, notably email, electronic materials, and social media. But signaling that there is no substitute for face-to-face recruiting, nearly all respondents listed "in-person events" as a key tool.

These trends have significant implications for campus practitioners of enrollment management. Today's enrollment managers must be both strategic and systems thinkers. They must be adroit at assessing and adopting new technologies, and skilled in analyzing data. They must be adept campus politicians. Moreover, they need to work well under extraordinary pressure.

Highlights
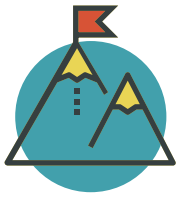
MOST INSTITUTIONS ARE AHEAD OF MANY ADMISSIONS GOALS—WITH NOTABLE EXCEPTIONS.

While many institutions met or exceeded important admissions goals in select areas (e.g., application volume and recruiting low-income, male, and diverse students), more than a third of respondents reported that their institution had not met its targets in three critical areas: net revenue, total headcount, and yield.

RECRUITERS ARE TARGETING MORE LOW-INCOME STUDENTS, FEWER INTERNATIONAL STUDENTS.

When asked to characterize their institution's recruitment goals for 2017, 36 percent of respondents reported they hoped to increase the number of low-income students they recruited, versus 24 percent who cited that goal in 2015. And while 70 percent of institutions reported seeking to recruit more international students in 2015, just 57 percent said that was a goal for 2017.

INSTITUTIONS PLAN TO TAP MORE STUDENTS FROM WAIT LISTS.

Nearly a fourth of institutions surveyed anticipated accepting more students from wait lists for 2017. Twenty percent said they thought they would accept "slightly more" wait-listed candidates for admission, while 4 percent thought they would accept "much more" of those potential enrollees.

MERIT AID IS LESS SIGNIFICANT FOR SHAPING CLASSES.

This year, we saw a significant drop in institutions using merit aid to shape their incoming class. Compared with 72 percent of institutions that reported using merit aid as such a tool in comparable surveys in both 2014 and 2015, just 52 percent of institutions reported using merit aid as a tool to shape their first-year class in 2017.

ENROLLMENT MANAGERS WANT MORE TIME FOR DATA AND PLANNING.

Thirty-nine percent of respondents said they spend too little time gathering recruitment-related data, and 43 percent say they have too little time to analyze data. Nearly half (45 percent) said they don't spend enough time on strategic planning.

MORE FAFSAS MEANS MORE FOLLOW-UP.

More than two-thirds (67 percent) of respondents said their institution saw an uptick from last year to this year in the number of Free Application for Federal Student Aid (FAFSA) forms students and parents completed. Nearly half (48 percent) said they had to do more this year than last to follow-up on incomplete FAFSAs. Forty-four percent said they were seeing more FAFSA filers with high demonstrated need for aid.

Introduction

If the field of college and university enrollment management wanted a theme song, a logical if predictable choice would be "The Times They Are A-Changin'." Once more art than science, college admissions has morphed into a complex business. Like many other dimensions of higher education, enrollment management is evolving at a dizzying pace. One case in point is data analytics. While several recent studies have suggested that fewer than half of all colleges and universities are using predictive analytics for decision-making, more institutions are using increasingly more sophisticated data analytics to help them select their right cohort of students, keep those students enrolled over time, and help students succeed academically.

Other factors are at work as well. Don Hossler, a senior scholar with the Center for Enrollment Research, Policy, and Practice at the Rossier School of Education at the University of Southern California, says that declines in state appropriations for higher education have pushed many public institutions to adopt more strategic and perhaps more aggressive enrollment management strategies. Hossler, who himself was once a vice chancellor for student enrollment services, also notes that the rise in the number of low-income and first-generation students who are seeking a college education mandates further changes in recruitment strategies.

Changes in financial aid policies also contribute to the evolution of enrollment management, Hossler says, notably the increased use of more sophisticated "multivariate statistical techniques" that make awarding financial aid "a much more scientific enterprise."

In the 2016 report *Knocking at the College Door*, the Western Interstate Commission for Higher Education (WICHE) projected that the United States will produce fewer high-school graduates in each year between 2014 and 2023. This erosion comes after years of generally steady increases in graduates between 1996 and 2013. While the South and West are expected to see upticks in the number of high-school graduates, the Midwest and Northeast are expected to see declines. WICHE also projected consistent declines in the number of white graduates from public high schools and robust growth in the number of graduates of color.

Tom Green, the associate executive director of the American Association of Collegiate Registrars and Admissions Officers (AACRAO), says that in addition to those demographic shifts, enrollment managers are at the front lines of the challenge to keep higher education affordable. "The cost of higher education is outpacing family incomes in the United States," Green says. Among other implications, he argues, more students today are challenged to pay tuition costs—and are taking on more student debt—even while financial pressures are leading many institutions to increase tuition and change policies for financial aid. Such factors fundamentally complicate the job of the enrollment manager.

Adding to those challenges, Green says, is the public questioning of the value of a college degree. This increased scrutiny, he says, "creates a different focus for the enrollment manager about overall institutional brand and the way in which they try to tell their story about quality."

While enrollment mangers have long used data to drive their work, Green says, what's different today is that more managers are relying on data to make evidence-based strategic and future-focused decisions. Awash in data, though, today's enrollment managers need to learn how to tease out the meaning inherent in the numbers.

Jim Black, the president and CEO of SEM Works, a strategic enrollment management consulting firm, says that while more enrollment managers are using data, they are not yet using data to fully assess the enrollment landscape and design strategies appropriately. Worse, he says, some enrollment managers—and, often, the leaders they report to—choose to ignore the messages that the data is telegraphing. As an example, he cites institutions that have aggressive plans for growth even as their pool of potential students is shrinking. "I don't believe, as the saying goes, that demographics is necessarily destiny, but it sure is a powerful force to be reckoned with," Black says.

Black says part of the problem with institutional use of enrollment data today is that it focuses too much on lagging metrics, like numbers of inquiries, applicants, students who enroll, and students who are retained. It would be better, he believes, to focus instead on leading indicators, "where we're really getting down to analyzing the performance of strategies."

"If you are not taking seriously the things in the environment around you, and you don't know what strategies are working and which ones don't, you're not really being strategic," Black says. "And I don't think a lot of schools are there."

Too often, Green says, "enrollment managers are kind of left out there on their own, without a lot of clear direction from the top," and that the mandate from top leadership frequently boils down to something like "we want more and better students, and pay less to get them."

Green urges that institutions and their leaders do more to let evidence like the data that enrollment managers collect guide their institution's strategic direction. "If I were to have a chance to talk with a president or a board member about enrollment management and how to support it," Green says, "the first thing I would say is that enrollment management is a data-and evidence-based field. That's how we see the world—we look for the data and we look for the evidence."

Further, Green suggests, boards and presidents need to be able to give the enrollment manager "specificity about the future of the university five to 10 years down the road." With that kind of guidance, he believes, enrollment managers will be better equipped to do more strategic and more effective data collection, assessment, management, and planning—and to then "plant some stakes in the ground" that can ultimately pay off in results from enrollment management that will help the institution reach its long-term goals.
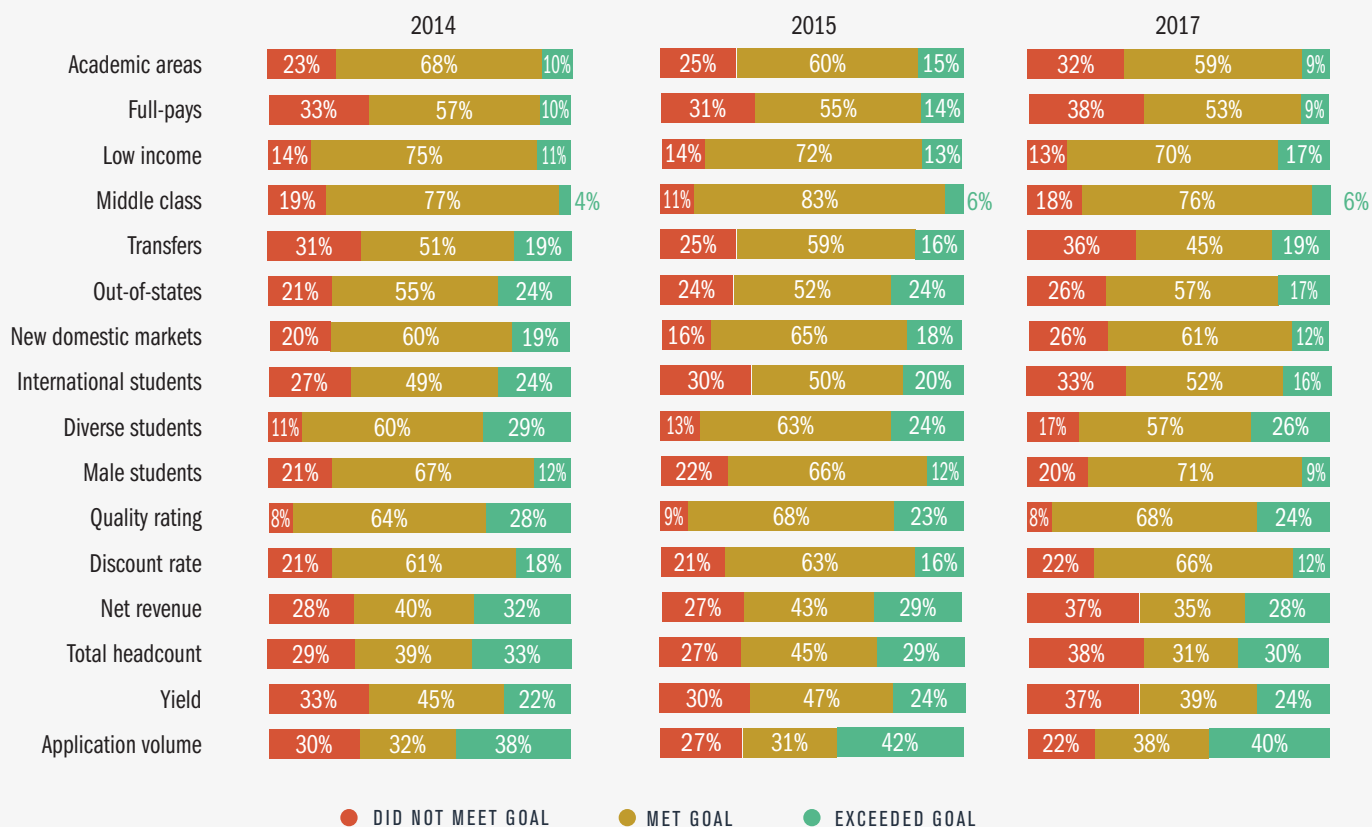
Trends in Enrollment and Admissions

70 percent of institutions reported seeking to recruit more international students in 2015; just 57 percent said that was a goal for 2017.

Admissions Goals

Figure 1 shows some areas where institutions achieved considerable success and a few results that could be categorized as disappointing. In the latter category, for example, the percentage of respondents who said their institution had not met its goals for net revenue was 37 percent for 2017, versus 27 percent in a similar survey in 2015. Similarly, while about a third of institutions (31 percent) met their goal for total headcount in 2017 and another third (30 percent) beat that target, 38 percent of institutions did not meet their goals for headcount, versus 27 percent in 2015. We also saw relative softness in the ability of institutions to meet their goals for yield—the percentage of students who enroll after being offered admission—with more than a third of institutions (37 percent) missing their targets in 2017, compared with 30 percent that missed that target in 2015.

Among areas of success, most institutions reported comfortably meeting or exceeding their goals for recruiting low-income, middle class, male, and out-of-state students. Institutions generally succeeded in making inroads into new markets for domestic students and in meeting their goals for recruiting diverse students and transfer students. Respondents also reported success in recruiting students with the academic caliber they seek and in filling seats in academic programs. According to the survey, 55 percent of respondents reported that their institution had seen a rise in the number of applications it received.

FIGURE 1
MOST INSTITUTIONS CONTINUE TO MEET OR EXCEED ADMISSIONS GOALS AND OBJECTIVES

	2014			2015			2017		
	Did not meet	Met	Exceeded	Did not meet	Met	Exceeded	Did not meet	Met	Exceeded
Academic areas	23%	68%	10%	25%	60%	15%	32%	59%	9%
Full-pays	33%	57%	10%	31%	55%	14%	38%	53%	9%
Low income	14%	75%	11%	14%	72%	13%	13%	70%	17%
Middle class	19%	77%	4%	11%	83%	6%	18%	76%	6%
Transfers	31%	51%	19%	25%	59%	16%	36%	45%	19%
Out-of-states	21%	55%	24%	24%	52%	24%	26%	57%	17%
New domestic markets	20%	60%	19%	16%	65%	18%	26%	61%	12%
International students	27%	49%	24%	30%	50%	20%	33%	52%	16%
Diverse students	11%	60%	29%	13%	63%	24%	17%	57%	26%
Male students	21%	67%	12%	22%	66%	12%	20%	71%	9%
Quality rating	8%	64%	28%	9%	68%	23%	8%	68%	24%
Discount rate	21%	61%	18%	21%	63%	16%	22%	66%	12%
Net revenue	28%	40%	32%	27%	43%	29%	37%	35%	28%
Total headcount	29%	39%	33%	27%	45%	29%	38%	31%	30%
Yield	33%	45%	22%	30%	47%	24%	37%	39%	24%
Application volume	30%	32%	38%	27%	31%	42%	22%	38%	40%

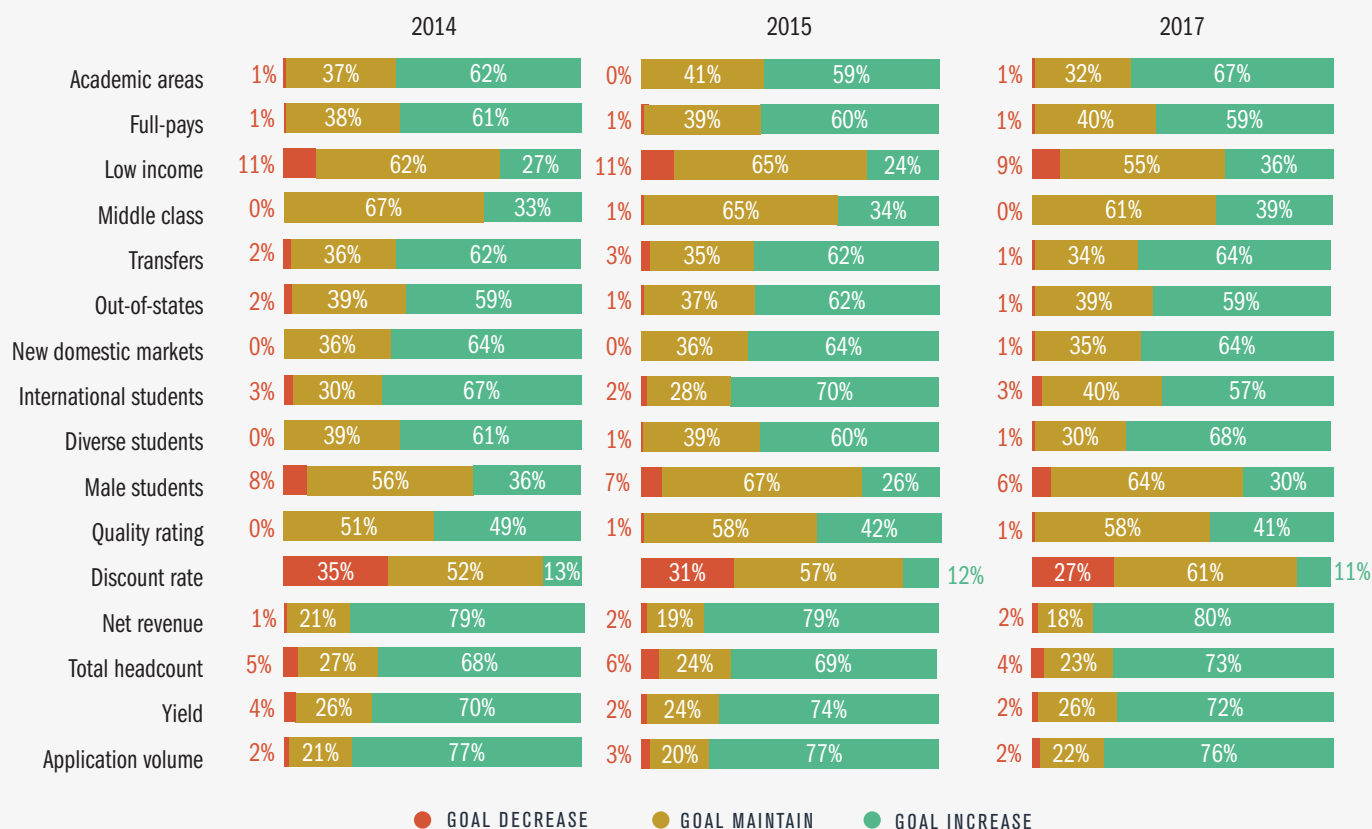● DID NOT MEET GOAL   ● MET GOAL   ● EXCEEDED GOAL

While it is unclear whether these data reflect the extent to which current uncertainty about federal immigration policy is affecting the international flow of students, 52 percent of respondents reported that they met their goals for recruiting international students and 16 percent exceeded them.

We found some unevenness in the ability of institutions to meet their goals for financial markers around enrollment management. While 53 percent of respondents said their institution met its goals for recruiting students with the ability to pay full tuition, for example, and 9 percent exceeded that goal, 38 percent of respondents fell short of their targets for "full-pays." Sixty-six percent of institutions met their goals in terms of their tuition discount rate.

When asked in 2015 about their plans for recruiting low-income students, 24 percent of respondents said their institutions had increased their goal for the student cohort. For 2017, however, we saw a noticeable uptick in this measure: 36 percent of respondents said their institution had increased its goal for recruiting low-income students.

The survey identified some erosion in institutional focus on recruiting international students, possibly reflecting that international students may be more reluctant to come to the United States for education in light of current uncertainty in federal immigration policy. While 70 percent of institutions reported seeking to recruit more international students in 2015, just 57 percent said that was a goal for 2017. **(See Figure 2.)**

FIGURE 2
HOW INSTITUTIONS CHARACTERIZE THE GOALS THEY SET FOR THIS YEAR'S ENTERING CLASS

	2014			2015			2017		
Academic areas	1%	37%	62%	0%	41%	59%	1%	32%	67%
Full-pays	1%	38%	61%	1%	39%	60%	1%	40%	59%
Low income	11%	62%	27%	11%	65%	24%	9%	55%	36%
Middle class	0%	67%	33%	1%	65%	34%	0%	61%	39%
Transfers	2%	36%	62%	3%	35%	62%	1%	34%	64%
Out-of-states	2%	39%	59%	1%	37%	62%	1%	39%	59%
New domestic markets	0%	36%	64%	0%	36%	64%	1%	35%	64%
International students	3%	30%	67%	2%	28%	70%	3%	40%	57%
Diverse students	0%	39%	61%	1%	39%	60%	1%	30%	68%
Male students	8%	56%	36%	7%	67%	26%	6%	64%	30%
Quality rating	0%	51%	49%	1%	58%	42%	1%	58%	41%
Discount rate	35%	52%	13%	31%	57%	12%	27%	61%	11%
Net revenue	1%	21%	79%	2%	19%	79%	2%	18%	80%
Total headcount	5%	27%	68%	6%	24%	69%	4%	23%	73%
Yield	4%	26%	70%	2%	24%	74%	2%	26%	72%
Application volume	2%	21%	77%	3%	20%	77%	2%	22%	76%

● GOAL DECREASE   ● GOAL MAINTAIN   ● GOAL INCREASE

Data from three similar studies, in 2014, 2015, and now in 2017, show remarkable consistency in university policies around select admissions policies. For example, the percentage of schools offering rolling admission has held steady across all three surveys at about 70 percent. Similarly, roughly a third of schools have consistently reported that they use wait lists, early action, and direct admission to spring term for undergraduate admissions, and roughly a quarter use early decision. **(See Figure 3.)**

FIGURE 3
PERCENTAGE OF INSTITUTIONS THAT USE THE FOLLOWING ADMISSIONS TOOLS

	Rolling admission	Wait list	Early action	Direct admission to spring term	Early decision	Fall study abroad followed by spring enrollment on campus
2014	68%	37%	30%	31%	24%	3%
2015	69%	35%	31%	26%	21%	2%
2017	70%	36%	35%	32%	25%	5%
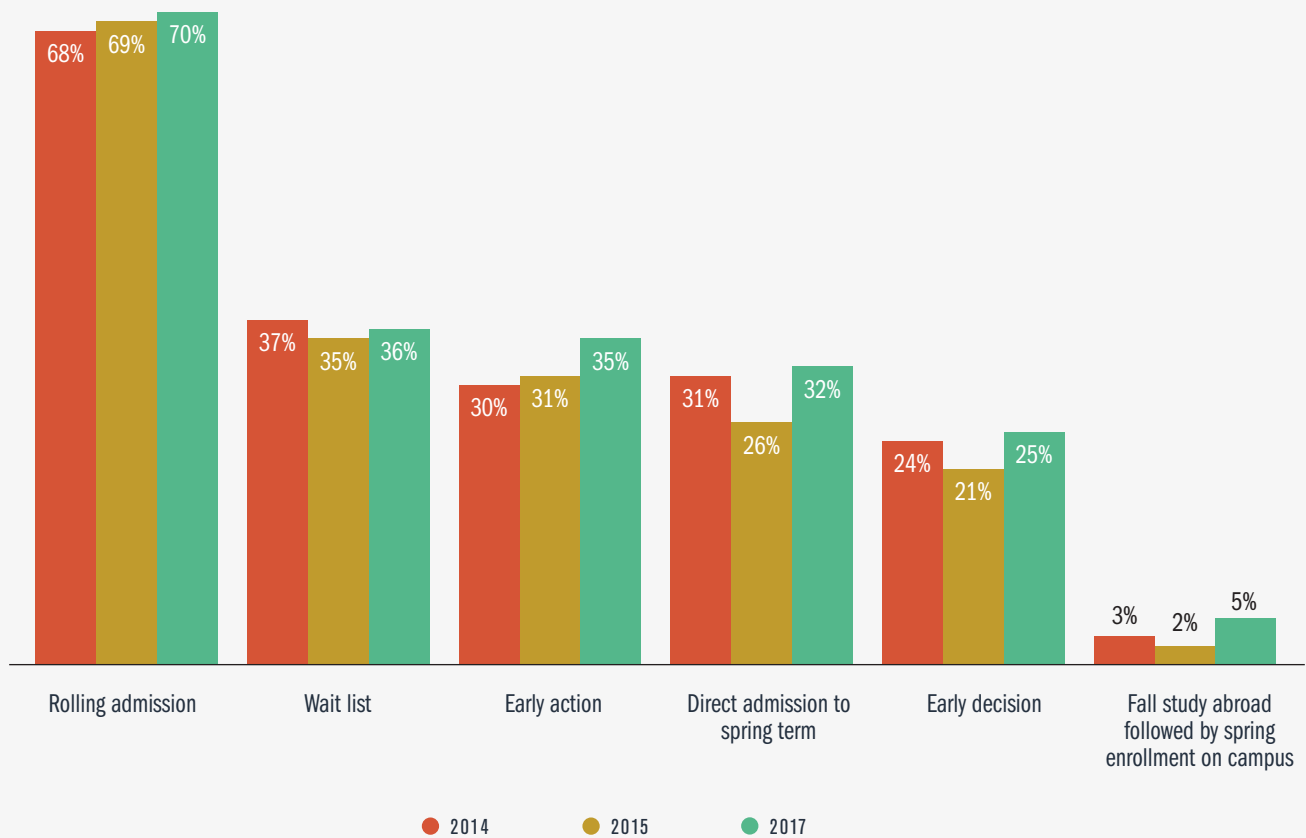
When we asked respondents in 2017 whether they anticipated accepting more or fewer students off their wait list this year, 20 percent reported that they did anticipate taking "slightly more" students from their wait list, and 4 percent said they intended to take "much more." **(See Figure 4.)**
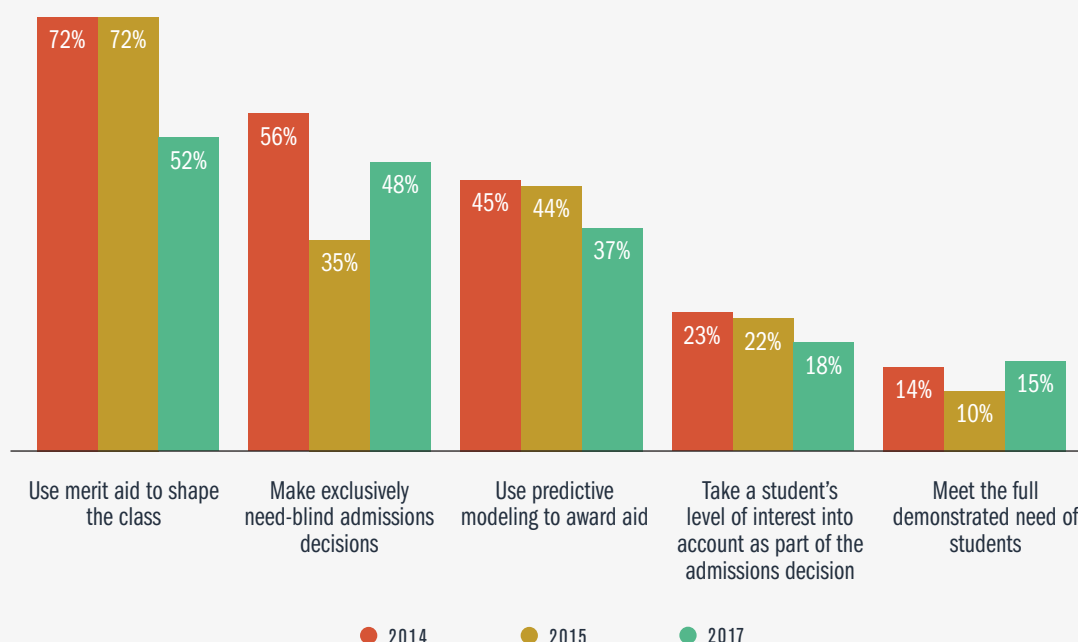
FIGURE 4
PERCENTAGE OF INSTITUTIONS THAT WILL ACCEPT MORE OR FEWER STUDENTS FROM THE WAIT LIST IN 2017

Much more	Slightly More	Same as last year	Slightly fewer	Much fewer	Too soon to tell
4%	20%	28%	13%	11%	25%

The survey surfaced what might represent a significant change in financial-aid policy. For 2017, just over half (52 percent) of respondents said their institution would use merit aid to shape their incoming first-year class. That's a significant decline from the 72 percent that reported using that strategy in both 2014 and 2015.

We saw a drop also in the number of respondents who said their institution took a student's level of interest into account as part of the admissions decision (18 percent in 2017, versus 22 percent and 23 percent in 2015 and 2014, respectively). **(See Figure 5.)**

FIGURE 5
PERCENTAGE OF INSTITUTIONS THAT USE THE FOLLOWING FINANCIAL AID/ADMISSIONS TOOLS

Use merit aid to shape the class: 72% (2014), 72% (2015), 52% (2017)
Make exclusively need-blind admissions decisions: 56% (2014), 35% (2015), 48% (2017)
Use predictive modeling to award aid: 45% (2014), 44% (2015), 37% (2017)
Take a student's level of interest into account as part of the admissions decision: 23% (2014), 22% (2015), 18% (2017)
Meet the full demonstrated need of students: 14% (2014), 10% (2015), 15% (2017)

● 2014   ● 2015   ● 2017

While it is too early to say whether this difference is a trend that reflects broader uncertainty in the international flow of students, we did find a drop in the importance that recruiters place in developing international student markets in comparison with developing domestic student markets for their undergraduate enrollment. There was a significant jump between 2015 and 2017 in the number of respondents who said that developing international student markets was a "far less important" factor in the institution's overall recruitment strategy than developing the domestic markets (22 percent of respondents said that in 2017, versus 13 percent in 2015). In 2017, 37 percent of respondents said both markets were equally important, compared with 45 percent of respondents in 2015. **(See Figure 6.)**

FIGURE 6
PERCENTAGE OF RESPONDENTS THAT SAY DEVELOPING INTERNATIONAL STUDENT MARKETS HAS SLIPPED IN IMPORTANCE COMPARED WITH THE IMPORTANCE OF DEVELOPING DOMESTIC UNDERGRADUATE STUDENT MARKETS
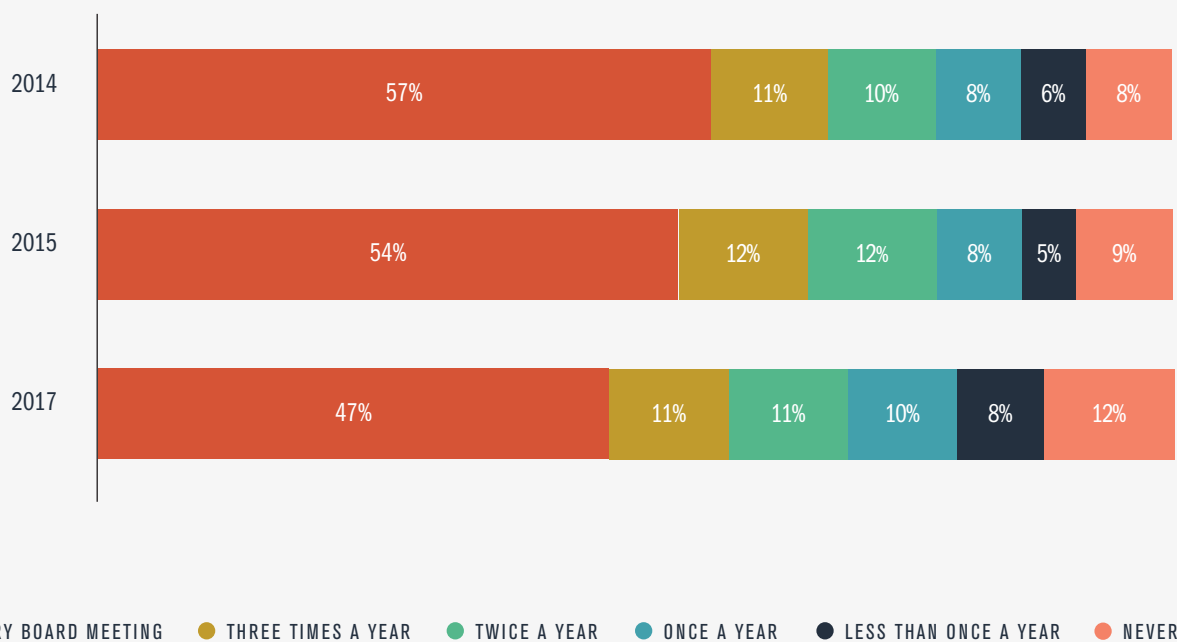

	FAR LESS IMPORTANT	LESS IMPORTANT	JUST AS IMPORTANT	MORE IMPORTANT	FAR MORE IMPORTANT
2014	16%	28%	40%	11%	5%
2015	13%	27%	45%	9%	5%
2017	22%	35%	37%	5%	0%
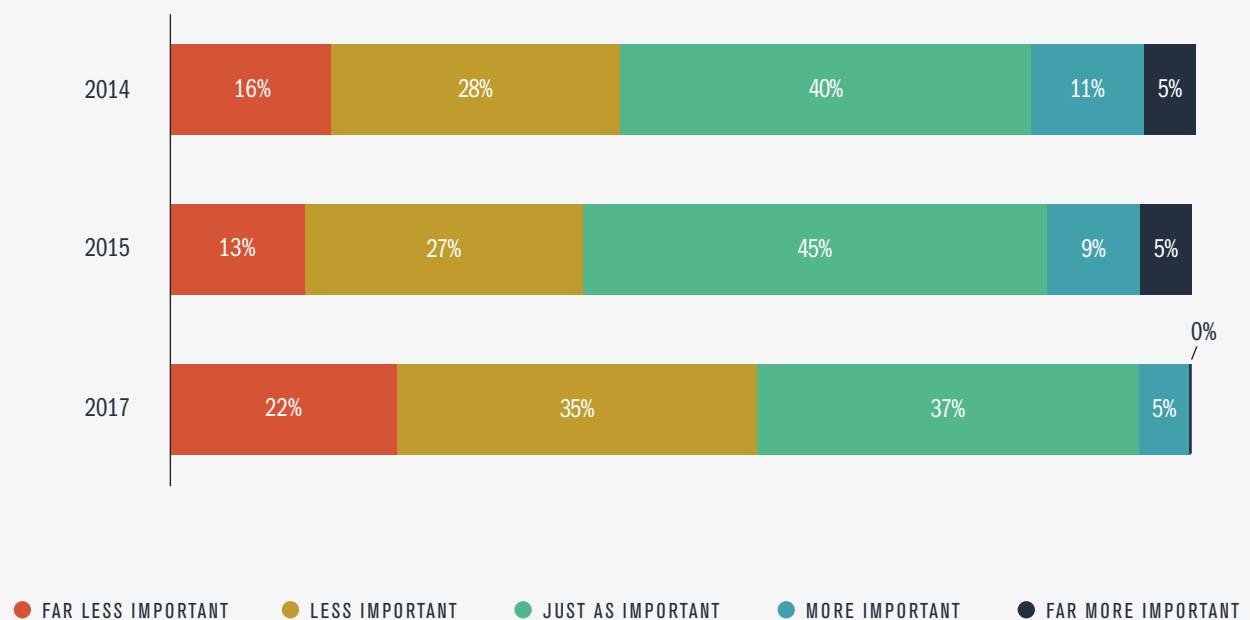
Board Relationships

The survey shows some changes in the way enrollment managers communicate with their institution's board of trustees. In general, enrollment managers do not seem to have the ear of their boards when it comes to enrollment-management issues that they seemed to have even a few years ago.

The number of respondents who say they communicate information about enrollment directly to trustees at every board meeting has declined by 10 percentage points since 2014 (47 percent of respondents made that statement in 2017, in contrast with 57 percent in 2014). **(See Figure 7.)**

FIGURE 7
ENROLLMENT MANAGEMENT CONTINUES TO DECREASE FREQUENCY OF COMMUNICATIONS TO BOARDS

Year	At every board meeting	Three times a year	Twice a year	Once a year	Less than once a year	Never
2014	57%	11%	10%	8%	6%	8%
2015	54%	12%	12%	8%	5%	9%
2017	47%	11%	11%	10%	8%	12%

● AT EVERY BOARD MEETING ● THREE TIMES A YEAR ● TWICE A YEAR ● ONCE A YEAR ● LESS THAN ONCE A YEAR ● NEVER

Just 44 percent of respondents said they reported to trustees on the broader landscape for enrollment writ large (the "state of the market"), down from 63 percent in 2015.

We also saw some erosion in the percentage of respondents who said they reported to the board on special initiatives (47 percent in 2017 versus 56 percent in 2015), and those who said they reported to the board on enrollment goals related to the strategic plan (70 percent in 2017 versus 79 percent in 2015). Even the number of respondents who said they regularly communicate standard enrollment updates or dashboards to their institution's board was down somewhat (88 percent in 2017 versus 95 percent in 2015). **(See Figure 8.)**

FIGURE 8
INFORMATION SHARED BY INSTITUTIONS WITH THEIR BOARDS ON ENROLLMENT-MANAGEMENT ISSUES

|	2014	2015	2017
Standard enrollment updates or dashboards	93%	95%	88%
Reports on enrollment goals related to the strategic plan	79%	79%	70%
Reports on the state of the market	63%	63%	44%
Reports on other special initiatives	58%	56%	47%
Reports on student-success initiatives	46%	44%	41%
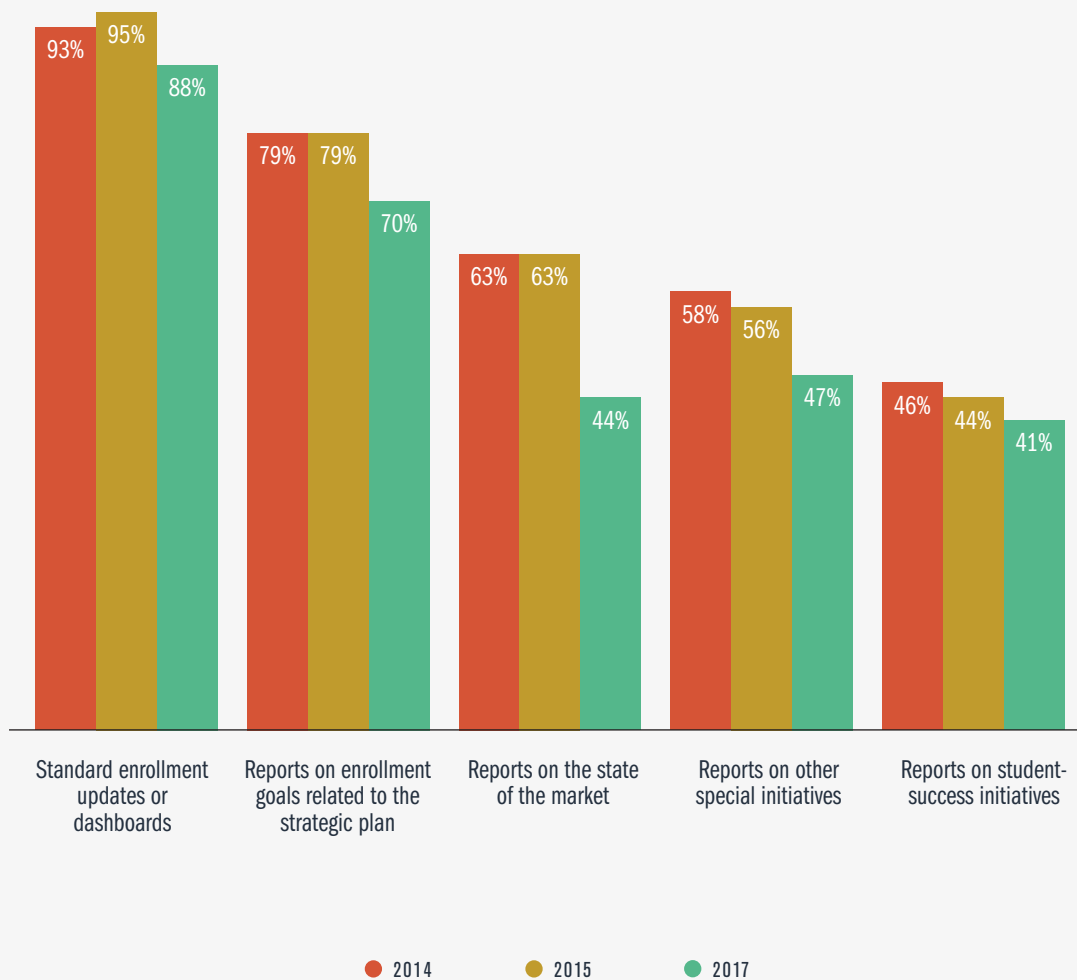
According to our data, fewer boards of trustees have committees that are solely focused on enrollment issues. In 2015, 54 percent of respondents said their institution's board had such a committee, but in 2017, just 38 percent of respondents reported that. (This may be a good thing for some institutions where board members meddle in tactics for enrollment management versus helping to set broad goals and leaving the task of reaching those goals to campus professionals.) **(See Figure 9.)**

FIGURE 9
PERCENTAGE OF INSTITUTIONS THAT HAVE A BOARD COMMITTEE FOCUSED ON ENROLLMENT ISSUES

Year	Percentage
2014	48%
2015	54%
2017	38%
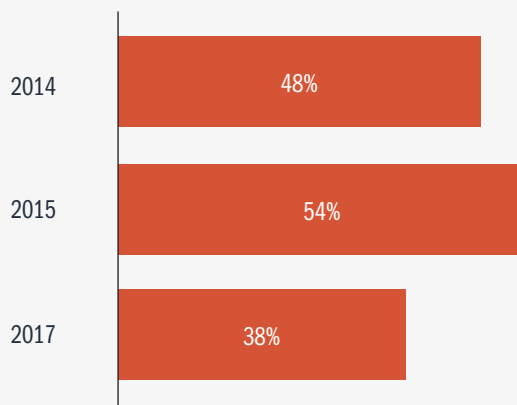
Our survey data show that information about admissions/financial aid has more influence on boards at private institutions than in public institutions. Perhaps more important, though, we saw a drop in 2017 in the percentage of enrollment managers who feel that admissions/financial aid information is important to decision-making by boards of trustees. In private institutions, the percent of respondents who said such information was influential was 48 percent, compared with 59 percent in the 2015 survey. In public institutions, 16 percent of respondents in 2017 said that information was influential at the board level, compared with 28 percent who said it was influential in 2015. **(See Figure 10.)**

FIGURE 10
ENROLLMENT MANAGEMENT CONTINUES TO BE MORE INFLUENTIAL ON BOARD DECISIONS IN PRIVATE INSTITUTIONS

Private

2014	2015	2017
60%	59%	48%

Public

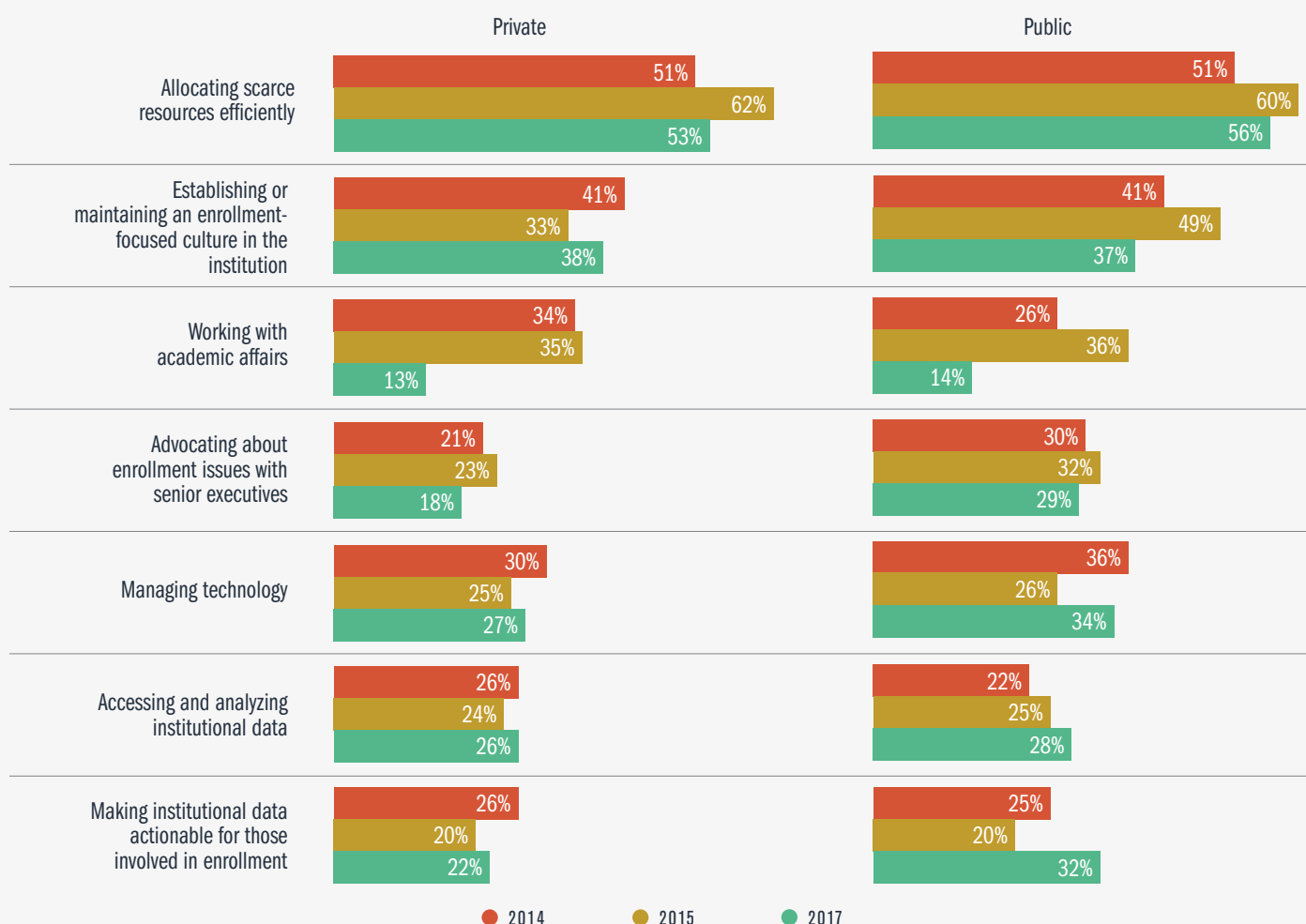| 2014	2015	2017
26%	28%	16%
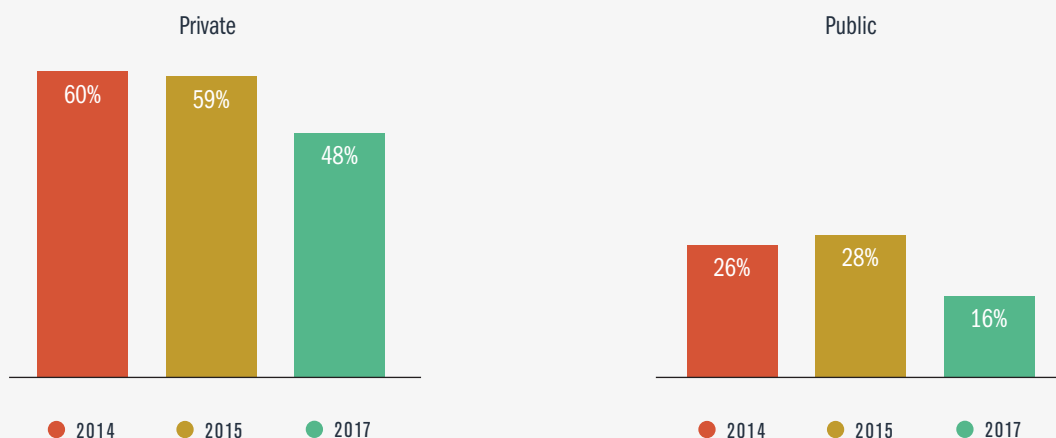
Challenges and Needs

In both private and public institutions, the top two challenges facing admissions/financial aid officials were the same: allocating scarce resources efficiently (53 percent of respondents in private institutions and 56 percent of respondents in public institutions ranked this as their top concern) and establishing or maintaining an enrollment-focused culture in the institution (38 and 37 percent, respectively). Managing technology was the third most important challenge in both sectors (27 and 34 percent, respectively).

Perhaps suggesting that administrators responsible for academic programs at colleges and universities are becoming more engaged in enrollment-management issues, and that more academic officers are becoming more deeply invested in the importance of recruitment in the institution's overall success, fewer respondents cited "working with academic affairs" as one of their top-three challenges in 2017 versus those who did so in 2015. **(See Figure 11.)**

FIGURE 11
TOP CHALLENGES ENROLLMENT OFFICERS FACE

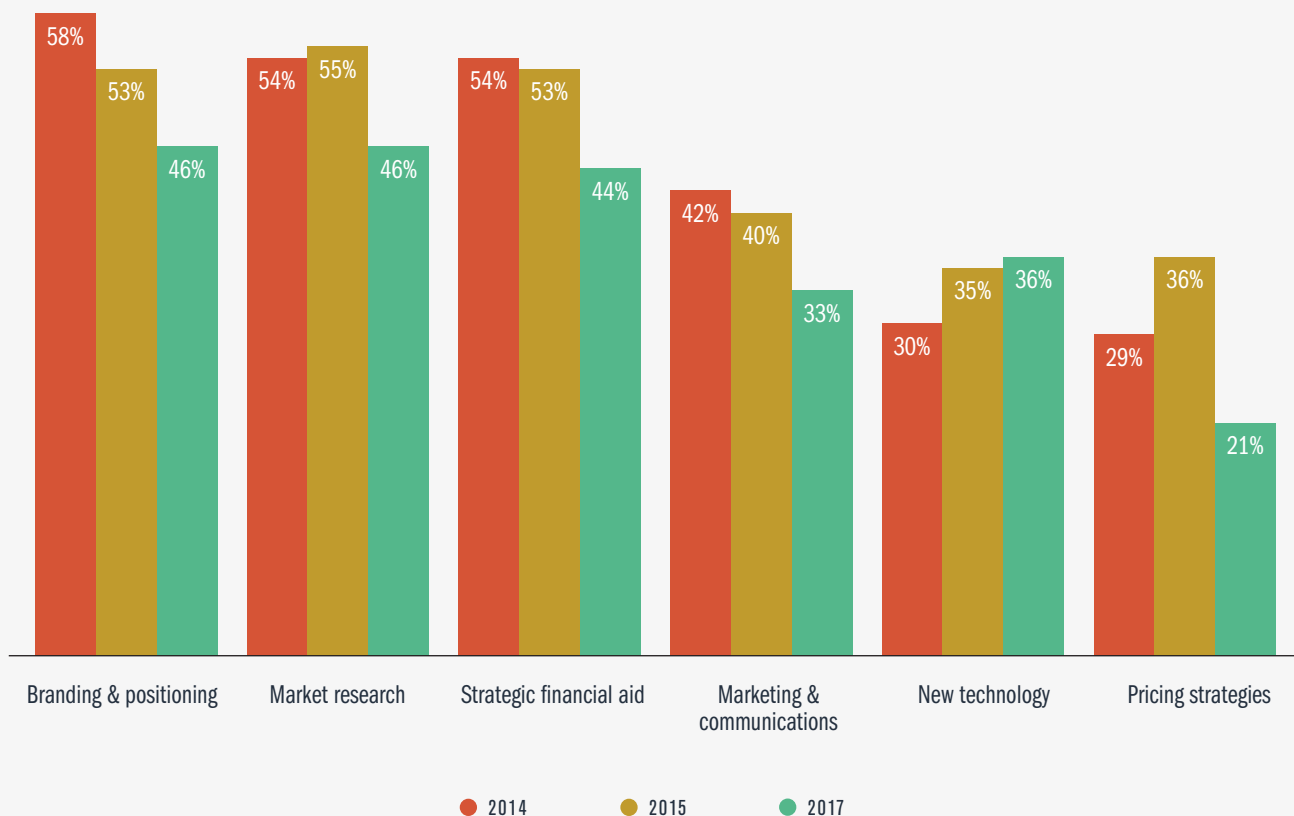|	Private		Public		
Allocating scarce resources efficiently	51% / 62% / 53%		51% / 60% / 56%		
Establishing or maintaining an enrollment-focused culture in the institution	41% / 33% / 38%		41% / 49% / 37%		
Working with academic affairs	34% / 35% / 13%		26% / 36% / 14%		
Advocating about enrollment issues with senior executives	21% / 23% / 18%		30% / 32% / 29%		
Managing technology	30% / 25% / 27%		36% / 26% / 34%		
Accessing and analyzing institutional data	26% / 24% / 26%		22% / 25% / 28%		
Making institutional data actionable for those involved in enrollment	26% / 20% / 22%		25% / 20% / 32%		

● 2014 ● 2015 ● 2017

Whether this is a function of lower institutional budgets for outside help, the development of more inside expertise, or other factors, less than half of respondents said their institution was likely to hire consultants related to enrollment management or financial aid, across a range of specific areas of expertise. Further, the data show a drop over time in an institution's likelihood of hiring outside expertise, again across a range of specialties.

For example, just 46 percent of institutions intended to hire branding consultants this year, versus 53 percent in 2015 and 58 percent in 2014. The percent of institutions that intended to hire pricing strategists fell to 21 percent in 2017, in contrast with 36 percent in 2015.

Among six areas of consulting expertise that we asked about, the only area in which institutions indicated they were more likely to employ outside consultants had to do with new technology, but the difference between interest in that field in 2017 and 2015 was negligible (36 percent versus 35 percent, respectively). **(See Figure 12.)**

FIGURE 12
AREAS IN WHICH INSTITUTIONS ARE MOST LIKELY TO EMPLOY OUTSIDE CONSULTANTS

	Branding & positioning	Market research	Strategic financial aid	Marketing & communications	New technology	Pricing strategies
2014	58%	54%	54%	42%	30%	29%
2015	53%	55%	53%	40%	35%	36%
2017	46%	46%	44%	33%	36%	21%

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Current State of Affairs in Enrollment and Admissions

Over the last few years, *The Chronicle of Higher Education* has reported frequently on how colleges and universities are increasingly using technology—from Facebook communities for prospective students to predictive analytics and technology-enhanced marketing research—to recruit classes, get the right mix of students, and fine-tune financial-aid budgets. Indeed, those kinds of tools, coupled with ones like virtual campus visits, have broadly expanded the enrollment manager's toolbox. Increasingly, universities are using sophisticated algorithms to weigh many factors about a student to determine whether that candidate is a good fit and whether the student is likely to come back after his or her first year. Beyond helping to boost yield rates, a similar sophistication with data is helping institutions fine-tune the way they award financial aid and meet revenue goals. Increasingly, too, technology is enabling enrollment staff to engage in what amounts to a personal but virtual conversation with prospective students.
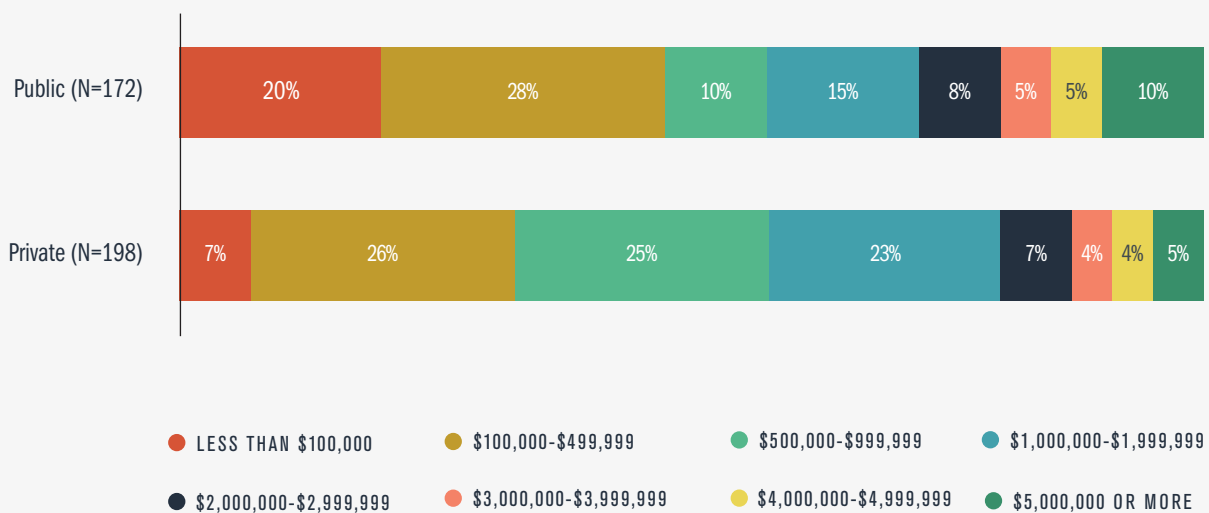
Some experts say that enrollment management as a profession is just on the cusp of beginning to tap technology's potential for improving recruitment practices. In the meantime, "old school" techniques are still very much part of the admission's officer's repertoire. Accordingly, our survey confirms that relatively new technologies like social media and e-materials have become integral to recruitment strategies, but it also shows that tried-and-true methods like print materials still have their place—as do face-to-face events.

In terms of making daily operations more efficient, technology may not be freeing time for enrollment managers to concentrate on big-picture concerns, or even on critical fundamental tasks: Survey respondents tell us that they don't have enough time to collect and analyze data, and two-fifths said they don't have enough time to communicate with prospective parents.

Resources

In both public and private higher education, the percentage of institutions that reported their budgets for admissions or enrollment were less than $1 million totaled 58 percent. Above the million-dollar threshold, survey data show differences between the public and private sector. In private higher education, for example, the percentage of institutions with budgets for these activities totaling between $1 million and $2 million totaled 23 percent, compared with 15 percent of public institutions. Ten percent of public institutions, however, spend more than $5 million or more for admissions or enrollment management, compared with 5 percent of private institutions that reach or exceed that threshold. **(See Figure 13.)**

FIGURE 13
ENROLLMENT MANAGEMENT OPERATING BUDGETS

Public (N=172)	20%	28%	10%	15%	8%	5%	5%	10%
Private (N=198)	7%	26%	25%	23%	7%	4%	4%	5%

- LESS THAN $100,000
- $100,000-$499,999
- $500,000-$999,999
- $1,000,000-$1,999,999
- $2,000,000-$2,999,999
- $3,000,000-$3,999,999
- $4,000,000-$4,999,999
- $5,000,000 OR MORE

In an open-response question, we asked respondents what changes they might make to their admissions and enrollment-management activities if they were given unlimited resources. The most often-cited activities were adding staff and increasing marketing activities and advertising budgets.
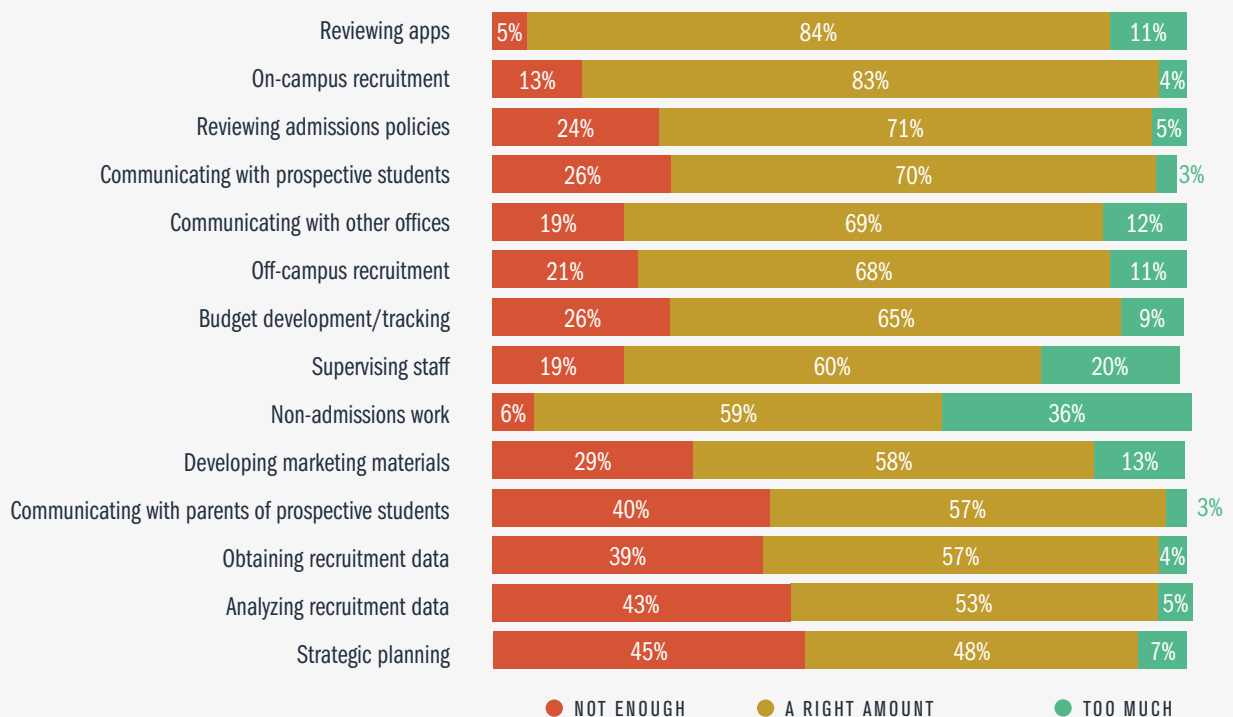
We culled this sampling of answers:

- *"Invest more resources in marketing (website, content acquisition, multimedia) and a more high-touch admission strategy (more admission counselors)."*

- *"More staffing and the development and understanding of our current CRM."*

- *"Spend more time in other countries meeting prospective students and parents and cultivating relationships to establish trust."*

Like many busy professionals, enrollment managers find it difficult to pack all the activities that they need to accomplish into a given day's work. But unfortunately, the work that they find that they do not get to might be among some of their most important tasks. For example, 40 percent of respondents in our survey believe they spend too little time communicating with parents of prospective enrollees. Thirty-nine percent said they spend too little time gathering recruitment-related data, and 43 percent say they have too little time to analyze data. Nearly half (45 percent) said they don't spend enough time on strategic planning.

More than a third (36 percent) say they spend too much time on "non-admissions work." One-fifth of respondents (20 percent) say they spend too much time supervising staff.

One implication seems to be that enrollment managers must spend so much time on the basic requirements of their jobs that they find it difficult to find the time to look at the big picture and plan for the long-term. **(See Figure 14.)**
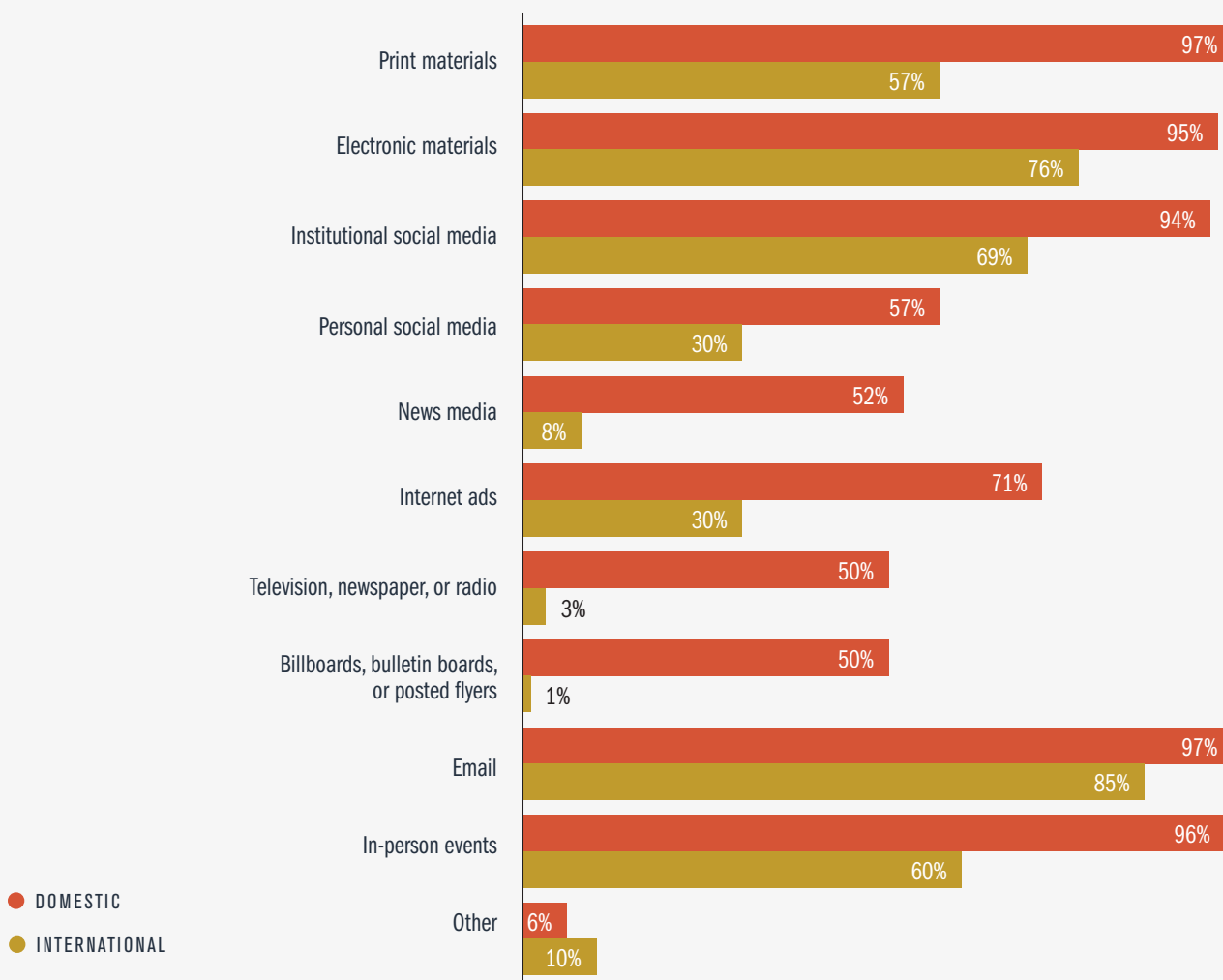
FIGURE 14
THE PERCENTAGE OF TIME ENROLLMENT OFFICERS SPEND ON KEY ACTIVITIES

Activity	NOT ENOUGH	A RIGHT AMOUNT	TOO MUCH
Reviewing apps	5%	84%	11%
On-campus recruitment	13%	83%	4%
Reviewing admissions policies	24%	71%	5%
Communicating with prospective students	26%	70%	3%
Communicating with other offices	19%	69%	12%
Off-campus recruitment	21%	68%	11%
Budget development/tracking	26%	65%	9%
Supervising staff	19%	60%	20%
Non-admissions work	6%	59%	36%
Developing marketing materials	29%	58%	13%
Communicating with parents of prospective students	40%	57%	3%
Obtaining recruitment data	39%	57%	4%
Analyzing recruitment data	43%	53%	5%
Strategic planning	45%	48%	7%

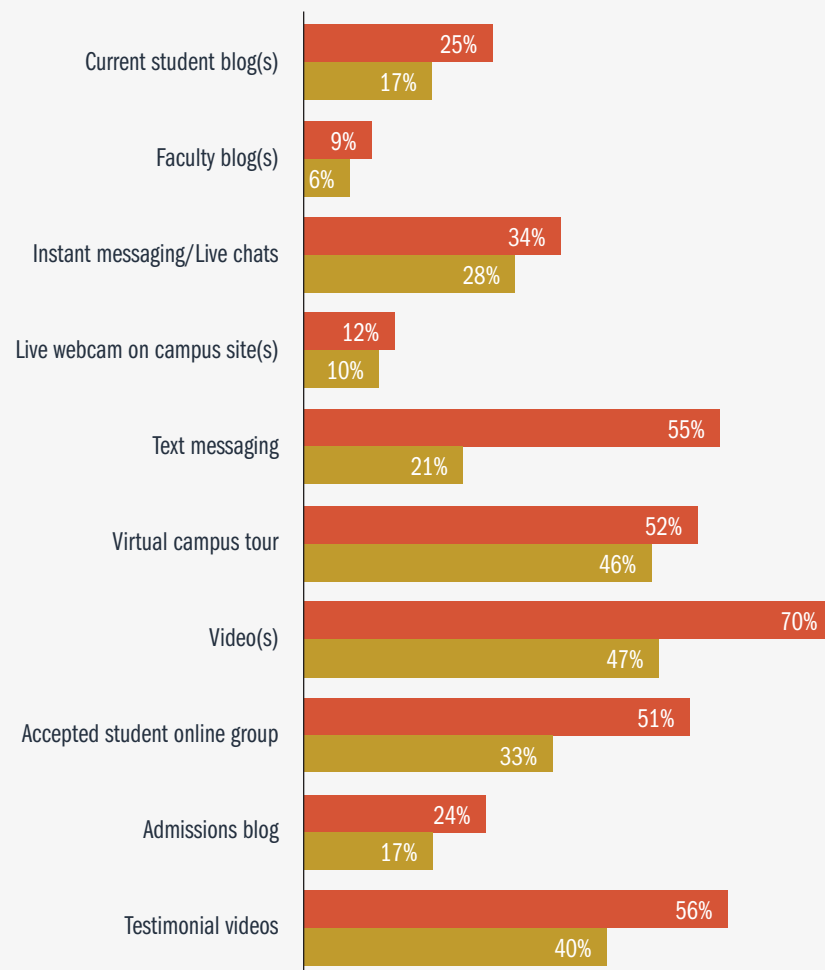● NOT ENOUGH   ● A RIGHT AMOUNT   ● TOO MUCH

Recruitment

When asked about the tools they use to reach prospective students in the United States, the vast majority of enrollment managers cited print materials (97 percent), email (97 percent), in-person events (96 percent), electronic materials (95 percent), and institutional social media (94 percent) as their most widely used tools. Of less importance but still significant was advertising on the Internet (71 percent). Farther down in the roster of tools were personal social media (57 percent); news media (52 percent); television, newspaper, or radio (50 percent); and billboards (50 percent). **(See Figure 15.)**

FIGURE 15
TOOLS USED IN DOMESTIC AND INTERNATIONAL RECRUITMENT

Tool	Domestic	International
Print materials	97%	57%
Electronic materials	95%	76%
Institutional social media	94%	69%
Personal social media	57%	30%
News media	52%	8%
Internet ads	71%	30%
Television, newspaper, or radio	50%	3%
Billboards, bulletin boards, or posted flyers	50%	1%
Email	97%	85%
In-person events	96%	60%
Other	6%	10%

- DOMESTIC
- INTERNATIONAL

When asked about their use of 10 different technology-based recruiting tools in the recruitment of domestic students, respondents said they were most likely to use videos (70 percent) and testimonial videos (56 percent) as well as text messaging (55 percent), virtual campus tours (52 percent), and accepted-student online groups (51 percent). Regarding the use of electronic tools for the recruitment of international students, admissions managers were most likely to turn to videos (47 percent) and testimonial videos (40 percent) as well as virtual campus tours (46 percent). **(See Figure 16.)**

FIGURE 16
MOST FREQUENTLY USED E-MATERIALS

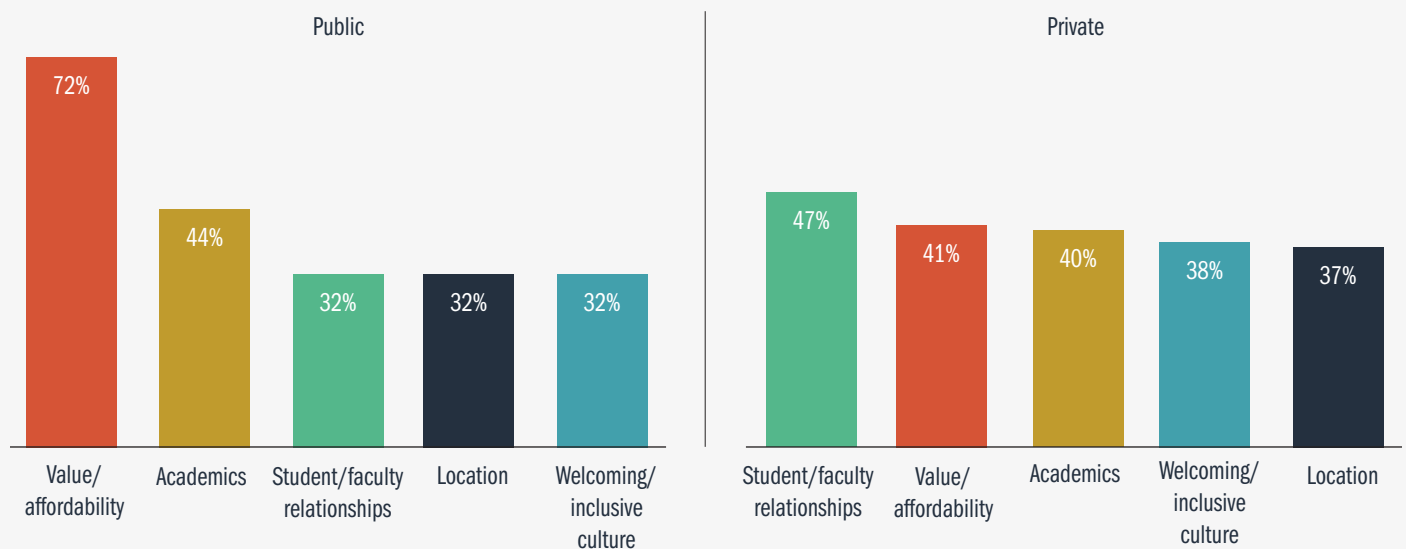| E-Material	Domestic	International
Current student blog(s)	25%	17%
Faculty blog(s)	9%	6%
Instant messaging/Live chats	34%	28%
Live webcam on campus site(s)	12%	10%
Text messaging	55%	21%
Virtual campus tour	52%	46%
Video(s)	70%	47%
Accepted student online group	51%	33%
Admissions blog	24%	17%
Testimonial videos	56%	40%

● DOMESTIC   ● INTERNATIONAL

We asked respondents to name the five aspects that they highlight most in their recruitment strategies for domestic students. In rank order, respondents cited value/affordability, academics, student/faculty relationships, a welcoming and inclusive culture, and location. **(See Figure 17.)**

FIGURE 17
INSTITUTIONAL ASPECTS HIGHLIGHTED IN RECRUITMENT STRATEGY FOR U.S. STUDENTS

Value/affordability	Academics	Student/faculty relationships	Welcoming/inclusive culture	Location
55%	42%	40%	34%	34%
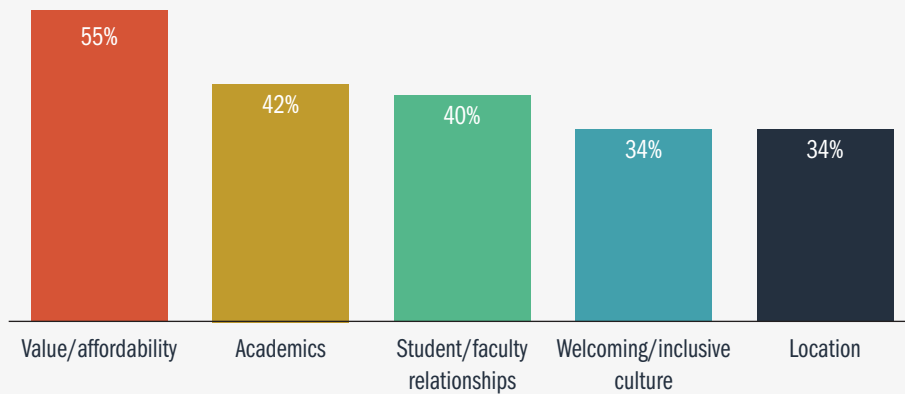
Comparing public and private institutions, however, the rank order of the strategies changed somewhat. Most notably, 72 percent of respondents from public institutions cited value/affordability first, while the first aspect cited by respondents from private institutions was student/faculty relationships. **(See Figure 18.)**

FIGURE 18
COMPARISON OF INSTITUTIONAL ASPECTS HIGHLIGHTED IN RECRUITMENT STRATEGIES OF DOMESTIC STUDENTS BY PUBLIC VS. PRIVATE INSTITUTIONS

Public

Value/affordability	Academics	Student/faculty relationships	Location	Welcoming/inclusive culture
72%	44%	32%	32%	32%

Private

| Student/faculty relationships	Value/affordability	Academics	Welcoming/inclusive culture	Location
47%	41%	40%	38%	37%

Admissions and Financial Aid

In recent years, more schools have done away with the requirement that students provide SAT or ACT scores as part of their application process. To better understand current practices, we asked respondents about their use of SAT scores.

When asked whether their institution uses SAT scores to make application decisions, 49 percent of respondents said that SAT scores are required at their institution. Another 30 percent said that SAT scores are considered but not required, and 22 percent said that their institution does not use SAT scores to make application decisions. **(See Figure 19.)**
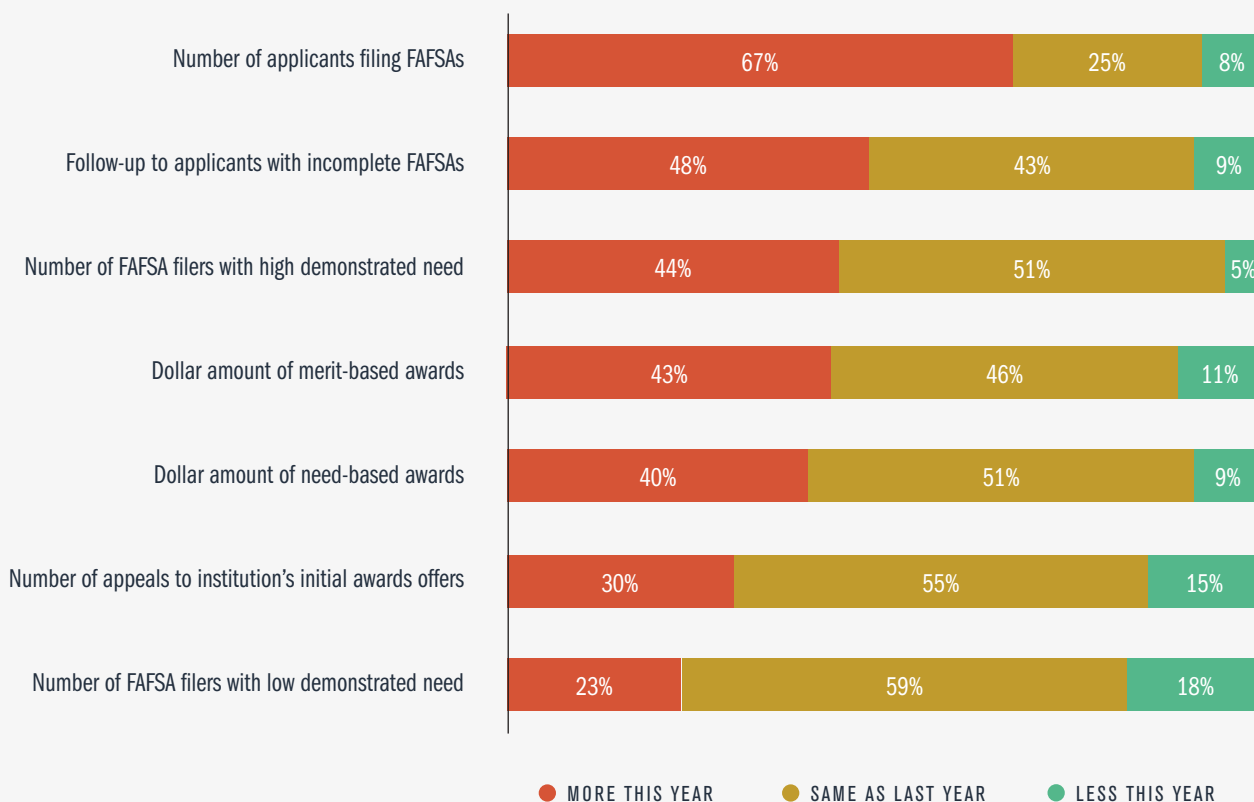
FIGURE 19

PERCENTAGE OF INSTITUTIONS USING SAT SCORES IN APPLICATION DECISIONS AND PERCENTAGE OF THOSE USING COLLEGE BOARD CONCORDANCE TABLES

Yes, SAT scores are considered but not required

30%

49%
Yes, SAT scores are required

22%
No

Using SAT Scores

Not sure

8%
No

4%

89%
Yes

Using College Board Concordance Tables
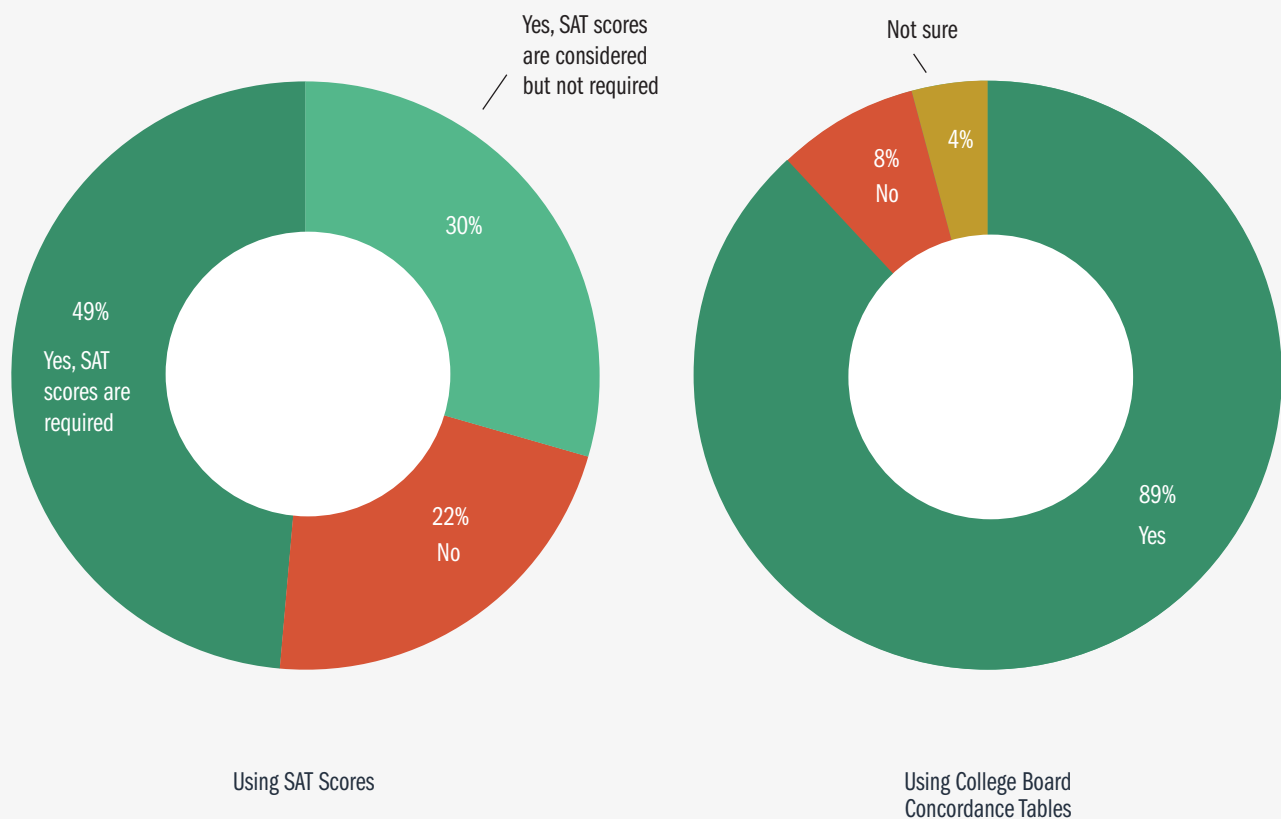
In response to a question about changes in applicant's filing of FAFSAs this year, 67 percent reported an increase in the number of applicants who are filing the form, and 48 percent reported that they needed to do additional work to follow up on applicants who had incomplete FAFSAs. Additionally, 44 percent of respondents had seen an increase in the number of FAFSA filers with high demonstrated need for financial aid.

About two-fifths of respondents (43 percent) reported an increase in the dollar amount of merit-based financial-aid awards at their institution, and 40 percent reported an increase in the dollar amount of need-based awards. About a third of respondents (30 percent) said their institution had seen an increase in the number of appeals about initial financial-aid offers. **(See Figure 20.)**

FIGURE 20
FAFSA CHANGES COMPARED WITH LAST YEAR

	MORE THIS YEAR	SAME AS LAST YEAR	LESS THIS YEAR
Number of applicants filing FAFSAs	67%	25%	8%
Follow-up to applicants with incomplete FAFSAs	48%	43%	9%
Number of FAFSA filers with high demonstrated need	44%	51%	5%
Dollar amount of merit-based awards	43%	46%	11%
Dollar amount of need-based awards	40%	51%	9%
Number of appeals to institution's initial awards offers	30%	55%	15%
Number of FAFSA filers with low demonstrated need	23%	59%	18%

● MORE THIS YEAR   ● SAME AS LAST YEAR   ● LESS THIS YEAR

One of the significant changes to the FAFSA for the 2017-2018 academic year was that the form collected income information from an earlier tax year (so-called prior-prior-year information). In part, this change was designed to help students and parents fill out the form sooner and thus get earlier indications of how much financial aid they might expect to receive. Asked about the extent to which the use of "Prior-Prior-Year" information on the FAFSA this year had impacted admissions and financial aid processes, 39 percent of respondents said the impact had been moderate or great.

Another factor that impacted the FAFSA process this year was that the federal government shut down its online data verification tool, a critical component for processing FAFSAs, because of attempts to hack that computer system. Of respondents in our survey, 14 percent said this had greatly impacted admissions and financial-aid processes at their institution and an additional 24 percent said it had had a moderate impact. **(See Figure 21.)**

FIGURE 21
THE IMPACT OF PRIOR-PRIOR-YEAR AND ISSUES WITH DATA VERIFICATION'S IMPACT ON ADMISSIONS PROCEDURES

5%	26%	30%	25%	14%
2%	28%	32%	24%	14%

● NOT AT ALL   ● MINIMALLY   ● SOMEWHAT   ● MODERATELY   ● GREATLY
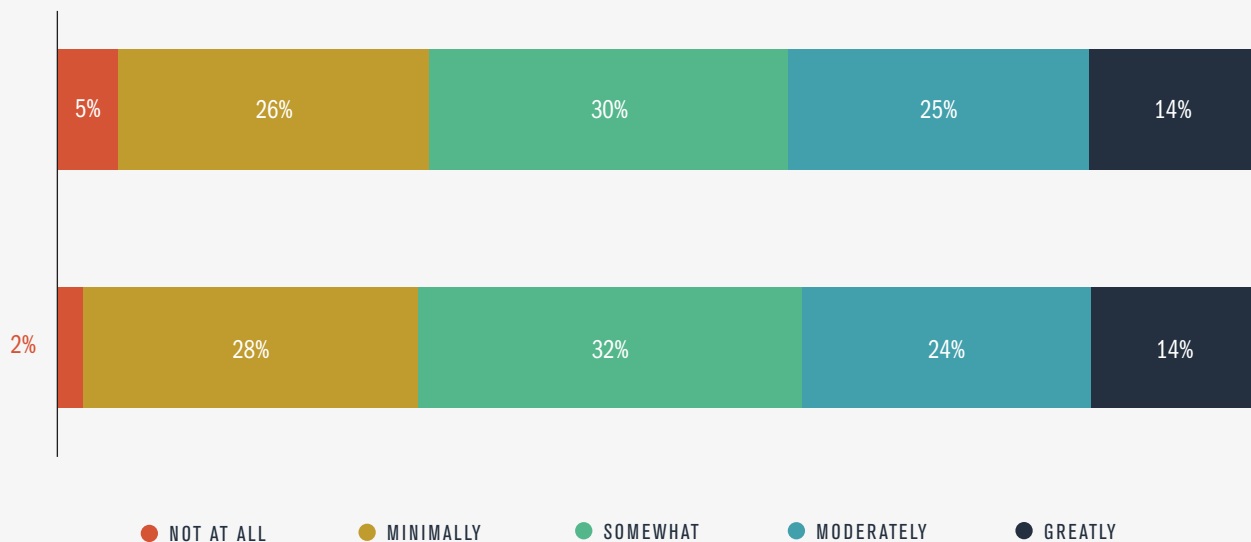
According to survey respondents, the relationship between admissions and financial aid at both private and public institutions tends to be insecure, siloed, and unproductive. Overall, the relationship is marked by stress and competition. On the other hand, respondents also characterized this relationship as more "forward-thinking" than "out-of-date." **(See Figure 22.)**

FIGURE 22
RESPONDENTS' DESCRIPTIONS OF THE RELATIONSHIP BETWEEN ADMISSIONS AND FINANCIAL AID

Confident	Insecure
Cooperative	Siloed
Rewarding	Unproductive
Forward-thinking	Out-of-date
Conventional	Innovative
Stressed	Easygoing
Competitive	Collaborative

PRIVATE   PUBLIC
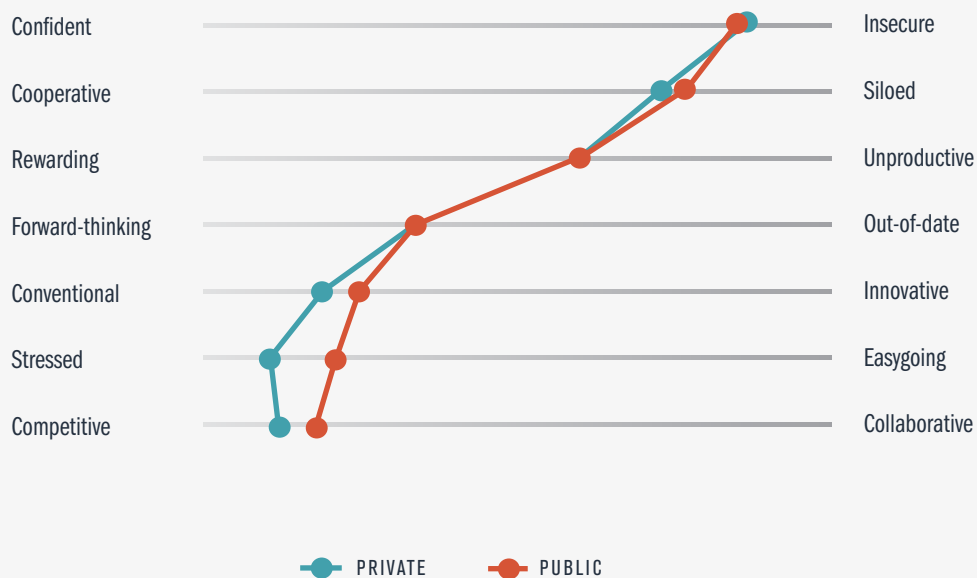
Forward Into the Future

The imperative that enrollment managers deliver results for the colleges and universities they serve has never been more pronounced. As the point people on the front lines of ensuring that their institutions recruit high-quality students in ample supply to meet financial targets, enrollment managers have perhaps never been under as much stress and strain as they are today.

"There are very few jobs on a campus today that are more stressful and potentially impactful than an enrollment position," says enrollment-management consultant Jim Black, the president and CEO of SEM Works. "And that's because, in most places, enrollment is the fuel that runs the place."

In many ways, the results of this survey reflect the challenges that enrollment managers feel. Many institutions continue to raise their expectations around admissions goals and targets, despite the reality that the pool of potential students coming out of high schools is shrinking in many areas. There are no signs that the confluence of competing factors will change anytime soon. That means that the stress that enrollment managers are feeling today will likely continue in the near future.

Looking closely at the survey results, several areas in the enrollment-management portfolio may need close scrutiny. One is simply the workload. Enrollment managers reported that they don't have time for strategic thinking and careful data analysis, given the everyday pressures of their day-to-day jobs. Concerted attention may be needed to free staff so that they can focus on the big picture.

Going forward, too, enrollment and admissions professionals will need to hone their skills in both collecting meaningful data and learning how to analyze those data in ways that can inform evidence-based decision-making. Enrollment managers may need to collaborate more with their campus colleagues in financial aid, who may be further along in analytics through their work in data-based financial-aid modeling.

In the wake of both campus belt-tightening precipitated by the most recent recession and a product also of constricting pools of potential students in many regions, many institutions have turned to recruiting international students to both help diversify their campuses and, especially, to bring in needed revenue. Early policy decisions in the Trump administration have made recruitment of international students harder. It seems likely that such conditions will continue.

In the face of today's demographic and fiscal challenges, SEM Works's Black urges enrollment managers to position themselves as agents of strategic change on their campuses. That means getting colleagues on board to make decisions—such as which academic programs should be started and which should be discontinued—in ways that will position the institution to meet today's enrollment challenges. Rather than preach a message of gloom and doom, Black says, enrollment managers will get further if they couple facts about demographic challenges with "a message of hope": "How is this going to be a better place to work? How are we going to serve students better? How are we going to affect our communities better? How are we going to make the classroom experience better?"

"There's not going to be a lot of people following you because there is a looming crisis," Black says, "They're going to follow you because they see a pathway to something better. And having the right balance around that is both an art and a science."

Methodology

Nonprofit U.S. higher-education admissions, enrollment-management and financial-aid administrators were invited to participate in this survey in April 2017 by Maguire Associates. Three hundred and forty-eight completed the survey. Of those respondents, 54 percent self-identified primarily as enrollment management and 46 percent said they work in admissions. Sixty-three percent of respondents work at the undergraduate level, 7 percent work at the graduate level, and 30 percent have responsibilities at both levels.

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