



## Board of Trustees

### Advancement & Enrollment Management Committee

12:30pm  
October 10, 2019  
President's Boardroom

- 
1. **Call to Order** Trustee Martinez-Alvarez
  
  2. **Approval of Minutes**  
June 20, 2019 Trustee Martinez-Alvarez
  
  3. **Items for Information**
    - a. Marts & Lundy Work Kathy Howrigan,  
Senior Consultant & Principal, Marts & Lundy
  
    - b. Philanthropy Awareness Erica Broman
    - c. Faculty/Staff Appeal Erica Broman
    - d. Institutional Advancement Dashboard Erica Broman
    - e. Upcoming Events Erica Broman
      - Donor Appreciation Event-Tuesday, November 12
    - f. Opening Numbers Dan Forster
    - g. EAB Review Dan Forster
    - h. Plans for Social & Digital Media Dan Forster
  
  4. **Items for Discussion**

**Attachment(s):**

- a) Minutes, June 20, 2019
- b) Marts & Lundy PowerPoint
- c) Philanthropy Friday Form
- d) IA Dashboard
- e) Opening Numbers
- f) EAB Review
- g) Plans for Social & Digital Media



## Board of Trustees

### Advancement and Enrollment Management Committee Minutes

President's Boardroom, The Horace Mann Center  
June 20, 2019

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**MEMBERS PRESENT:** Committee Chair Landrau, Vice Chair Hagan, Secretary Hill and Trustees Magovern, Martin and Swan.

**TRUSTEE GUESTS PRESENT:** Trustees Marcus, Martinez-Alvarez, and Queenin.

Dr. Ramon S. Torrecilha, President of Westfield State University, was also present.

The meeting was called to order at 11:25 AM by Committee Chair Landrau.

**MOTION** made by Trustee Magovern, seconded by Trustee Martin, to approve the minutes of the April 24, 2019 meeting. There being no discussion, **Motion passed unanimously.**

Committee Chair Landrau welcomed Dr. Erica Broman, Vice President for Institutional Advancement, who gave the following updates:

- The May 31, 2019 Dashboard was shared. The new normal for dollars raised will likely be between \$1.4 and \$2 million as a base of support is being built. Changes will be made to the Dashboard next year to reflect best practices.
- President Torrecilha and Trustees Hill and Hagan entered the meeting at 11:28 AM.
- Approximately \$7,000 is needed to reach the goal for the Interfaith Center match of \$50,000.
- There will be a celebration of Father Savage's 40 years of being ordained at St. Michael's in Springfield on July 21.
- A \$100,000 donation was received in May for scholarships targeting Hispanic students coming from Holyoke Community College.
- Westfield State received a 2019 CASE Educational Fundraising Award for overall fundraising program improvement at a public comprehensive institution.

Mr. Daniel Forster, Vice President for Enrollment Management, shared the following:

- Admission Funnel Report:
  - Net deposits and admits are up, MELT is holding steady with last year, and there is a small increase in the discount rate.
  - Academics are holding steady and the GPA in deposited students is encouraging.
  - Expecting to be under the 10% rule for exemptions.
  - To increase the first-to-second-year return rate from .769 to .8 would be 33 students, or \$330,000, with similar affects in following years.
- Admissions/Advancement Alumni Summer Kick-off Party:

- Event was started this year to address summer MELT, with parties being held in Auburn and East Bridgewater in late July, inviting all accepted students to meet alumni and staff.
- Students most likely to melt (MELT?) have been identified and contacted to offer assistance through the summer to keep on track.
- On campus, the only summer event is orientation. It was suggested to invite local students to come to campus over the summer to have them help each other, which has worked well in the public schools.
- Connecting with parents over the summer to keep them engaged is also important.

Dr. Broman stated that the fundraising firm of Marts and Lundy has come to campus to collect data and interview staff and will be building a feasibility study for a capital campaign for the Parenzo Hall renovation. Representatives from the firm will present at the full Board meeting later in the day. It was questioned whether the Advancement staff worked with charitable foundations for funding. Dr . Broman stated they don't currently have the staff for that, but that it would be an investment that would pay for itself.

There being no further business, **MOTION** made by Trustee Magovern, seconded by Trustee Swan, to adjourn. **Motion passed unanimously.**

Meeting adjourned at 11:46 AM.

Attachments presented at this meeting:

- a. Minutes of April 24, 2019 meeting
- b. IA Dashboard
- c. Admission Funnel Report

**Secretary's Certificate**

I hereby certify that the foregoing is true and correct copy of the approved minutes of the Westfield State University Board of Trustees Advancement and Enrollment Management Committee meeting held on June 20, 2019.

\_\_\_\_\_  
Paul Boudreau, Secretary

\_\_\_\_\_  
Date

# Assessing Potential for an Inspirational Campaign: **Westfield State University**

Kathy Howrigan  
Senior Consultant & Principal

Myrna Ghorayeb  
Associate Consultant

Brian A. Zive  
Consultant, Analytical Solutions

A PRESENTATION BY

**Marts&Lundy**

# Agenda

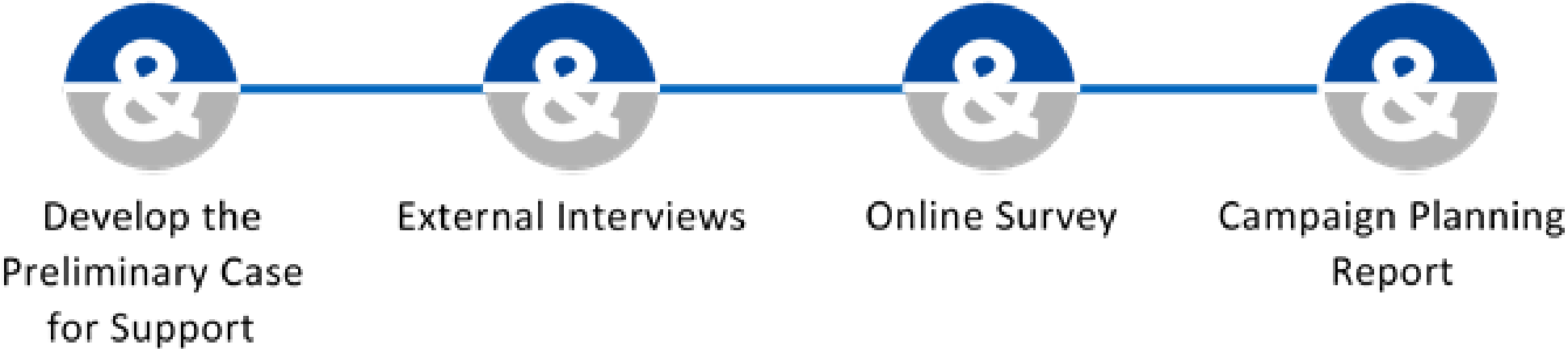
- ✓ Phase I Overview
- ✓ Yield Analysis
- ✓ Overall Recommendations
- ✓ Next Steps

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# Phase I Overview

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# Overview



# Phase I Objectives

- ✓ Identify strengths and challenges in WSU's fundraising programs.
- ✓ Identify areas of concern and potential obstacles; provide recommendations to address.
- ✓ Provide initial recommendations for any staffing changes.
- ✓ Provide recommendations for training/coaching on specific topics.



# Internal Assessment

- WSU has a strong vision and future to share with constituents.
- Advancement is under resourced for a campaign.
- Shared understanding and organizational effectiveness is a work in progress.
- Significant improvement in data quality yet challenges remain.
- WSU will need a comprehensive multi-year plan for Advancement.

# Trends Analysis

- ✓ Comprehensive look at the historical trends in fundraising program.
- ✓ Provides a historical perspective of fundraising achievement.
- WSU has seen significant growth in leadership and major gift revenue in the past three fiscal years.
- WSU has had a significant decrease in donors – particularly alumni donors.

# Benchmarking

- ✓ Compares WSU with 14 similar and aspirant public universities.
- ✓ Analyzes data from the Council for Advancement and Support of Education (CASE) Voluntary Support of Education (VSE) survey.
- WSU is relatively smaller than the cohort institutions on several measures, including enrollment and student body.
- WSU ranks below the cohort for most measures, in particular, alumni giving as a portion of total giving.

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# Yield Analysis

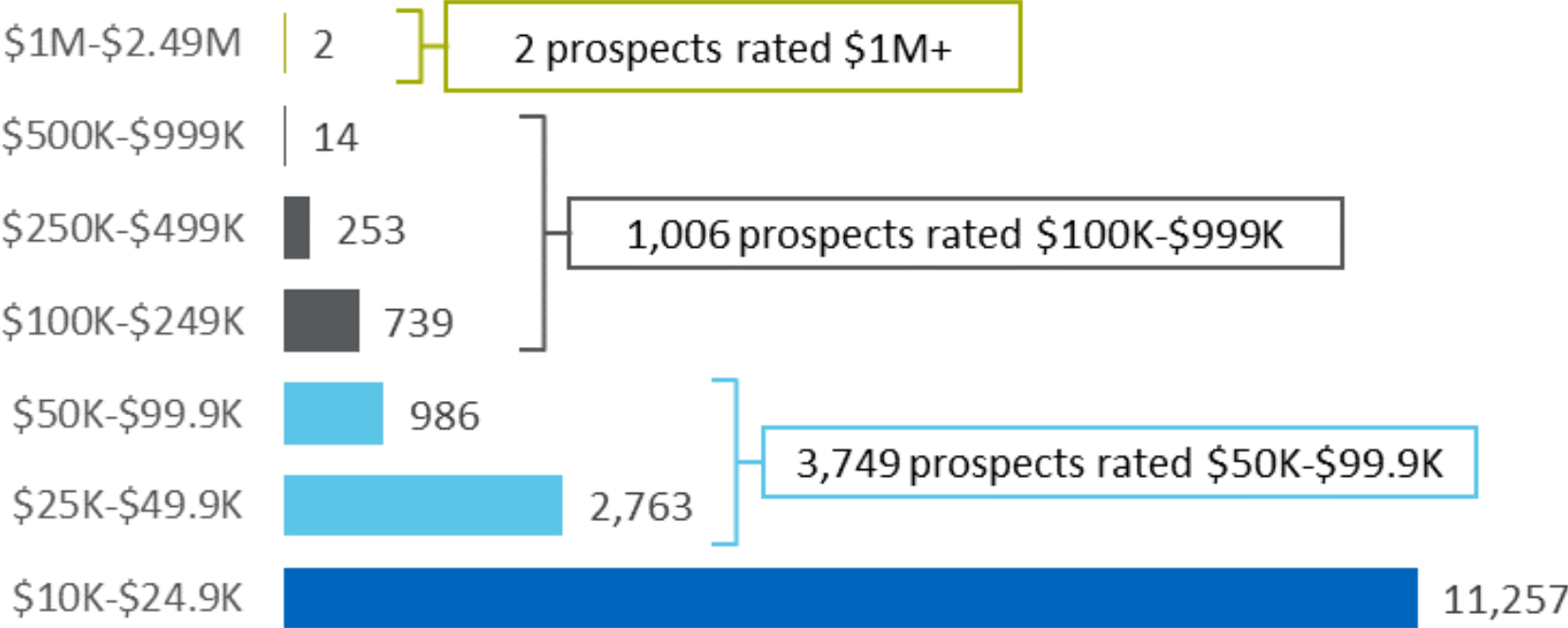
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# Yield Analysis Methodology

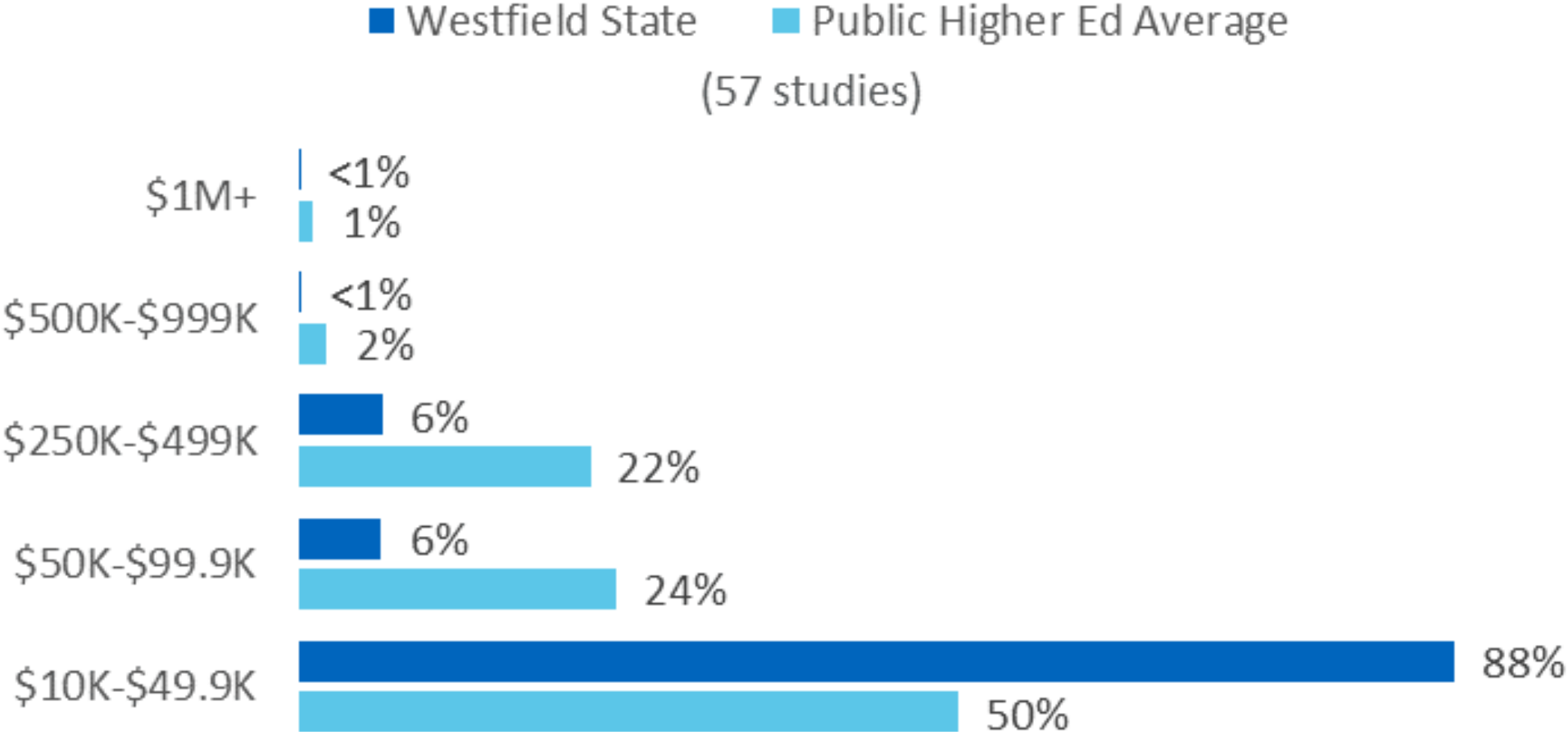


# Prospect Segmentation – by Capacity

- Westfield State has 16,014 prospects with major gift capacity.
- Only two prospects have \$1 million+ in capacity.



# Prospect Capacity Benchmarking



# Prospect Segmentation – By Affinity



	Likelihood	
High	229	1%
Medium	2,218	14%
Low	13,567	85%



# Prospect Affinity Benchmarking

■ Westfield State    ■ Public Higher Ed Average

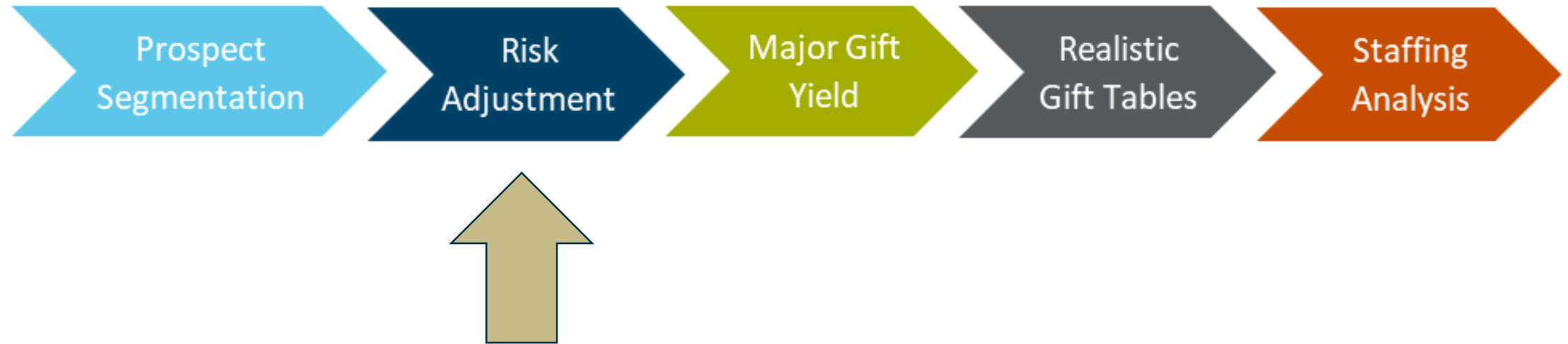
(56 studies)



# Prospect Segmentation by Capacity and Affinity

Prospects by Capacity and Likelihood				
Capacity	Prospects	Likelihood		
		High	Medium	Low
\$1M-\$2.49M	2	1	0	1
\$500K-\$999K	14	0	1	13
\$250K-\$499K	253	2	26	225
\$100K-\$249K	739	15	80	644
\$50K-\$99.9K	986	14	128	844
\$25K-\$49.9K	2,763	44	435	2,284
\$10K-\$24.9K	11,257	153	1,548	9,556
<b>Total</b>	<b>16,014</b>	<b>229</b>	<b>2,218</b>	<b>13,567</b>

# Yield Analysis Methodology



# Risk Adjustment

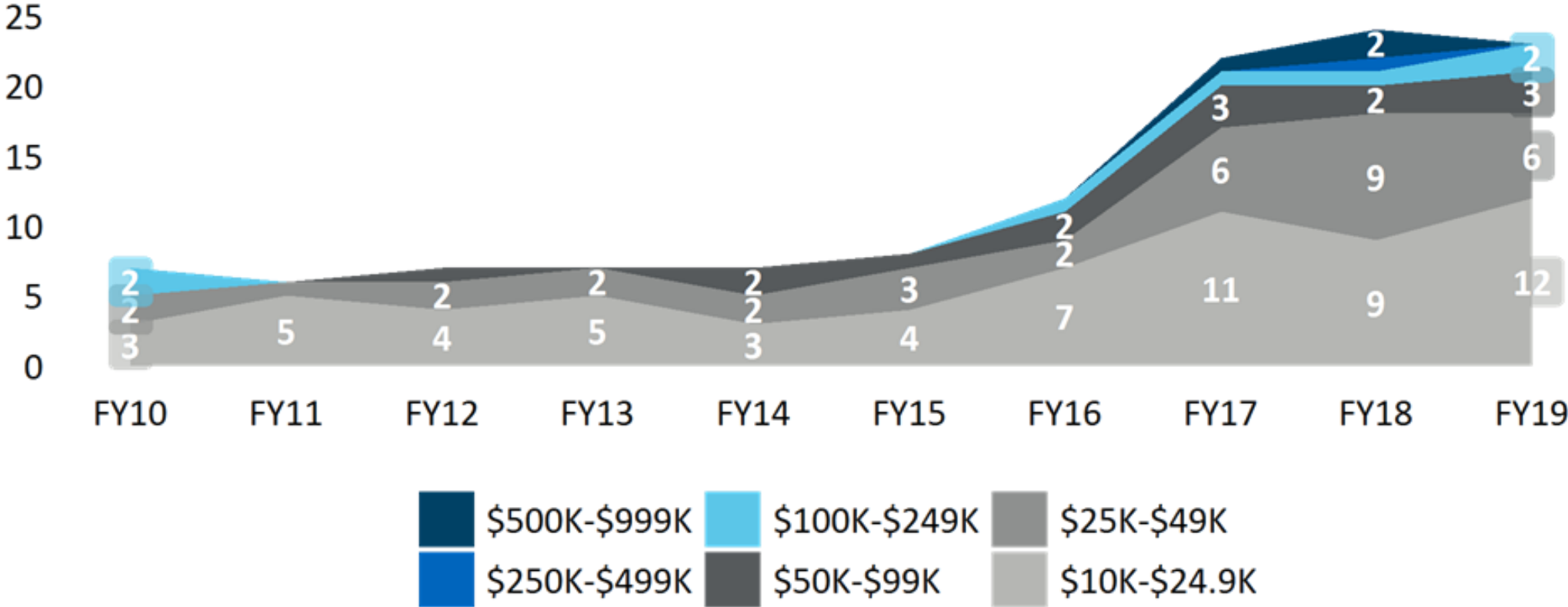
Prospects	Aggregate Base Capacity
16,014	\$377.1M



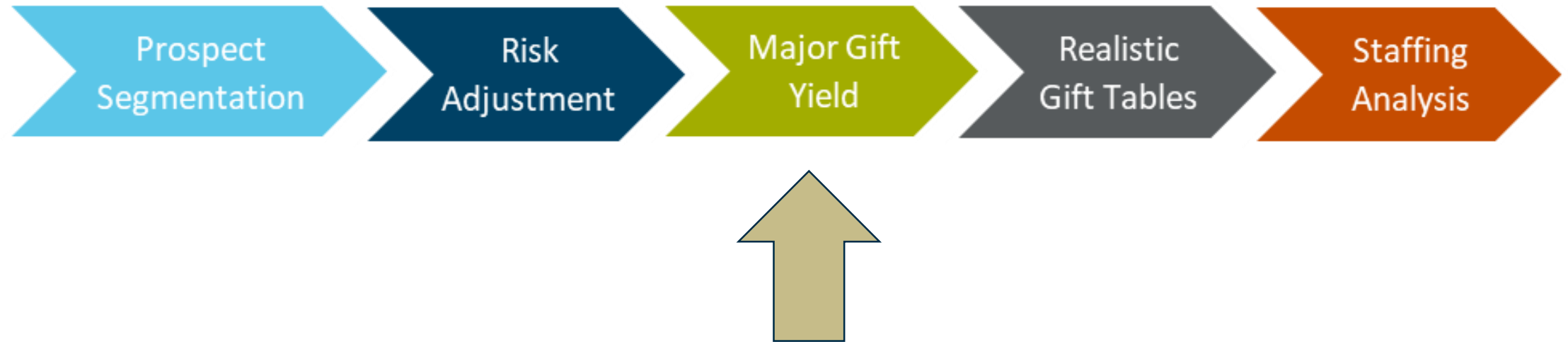
How much of this will you capture?

Risk Adjustment			
Prospect Likelihood	Prospects	Conversion Rate	Full Donor Equivalent
High	229	15%	34.35
Medium	2,218	5%	110.9
Low	13,567	1%	135.67
<b>Total</b>	<b>16,014</b>		<b>281</b>

# Risk Adjustment



# Yield Analysis Methodology



# Major Gift Yield

- **Marts & Lundy projects potential individual major gift yield of \$6.6 million to \$10.7 million over the course of a campaign.**
- This range is based on new gifts and new pledges, where pledges are typically payable over a five-year period.

Projected Major Gift Yield				
Capacity	Prospects	Full Donor Equivalent	Low Yield	High Yield
\$1M+	2	0.16	\$0.16M	\$0.28M
\$500K-\$999K	14	0.18	\$0.09M	\$0.13M
\$250K-\$499K	253	3.85	\$0.96M	\$1.44M
\$100K-\$249K	739	12.69	\$1.27M	\$2.22M
\$50K-\$99.9K	986	16.94	\$0.85M	\$1.27M
\$25K-\$49.9K	2,763	51.19	\$1.28M	\$1.92M
\$10K-\$24.9K	11,257	195.91	\$1.96M	\$3.43M
<b>Total</b>	<b>16,014</b>	<b>281</b>	<b>\$6.57M</b>	<b>\$10.70M</b>

*Products and totals may not equal the sum or product of their parts due to rounding.*

# Yield Analysis Methodology



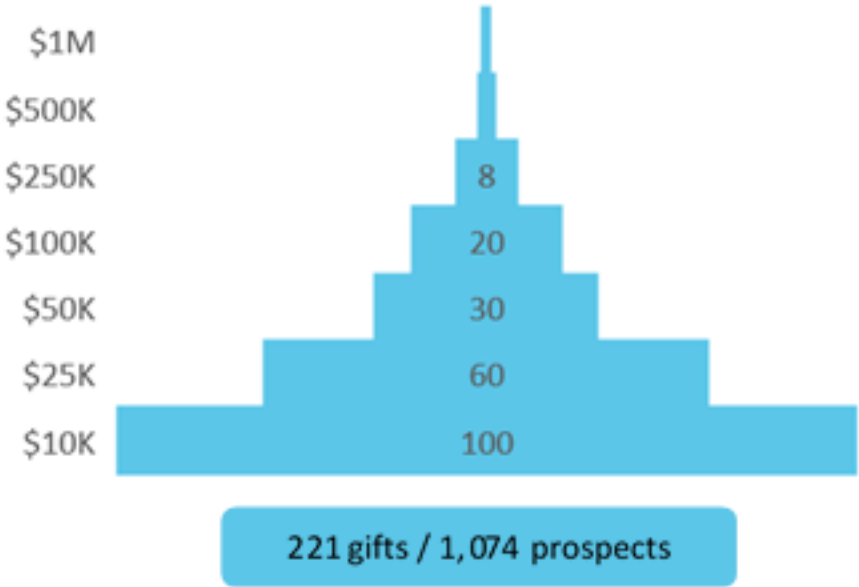


# Realistic Gift Tables and Gift Pyramids

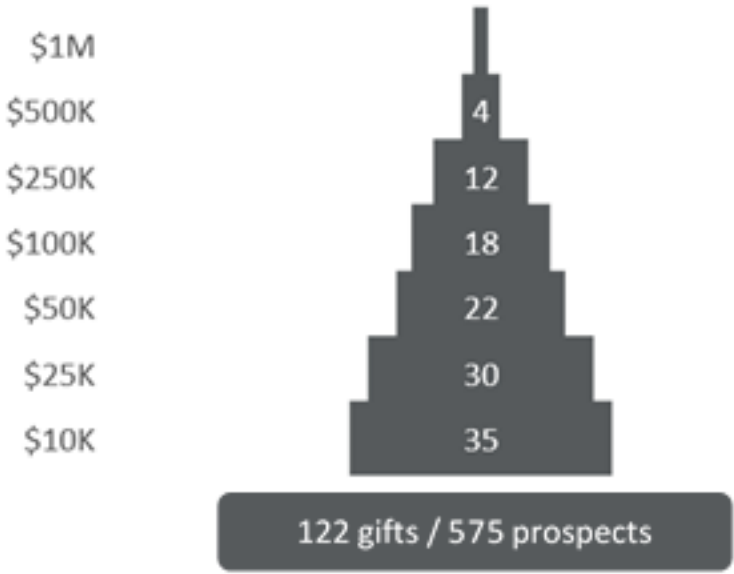
## \$10M Gift Pyramids

## \$20M Gift Pyramid

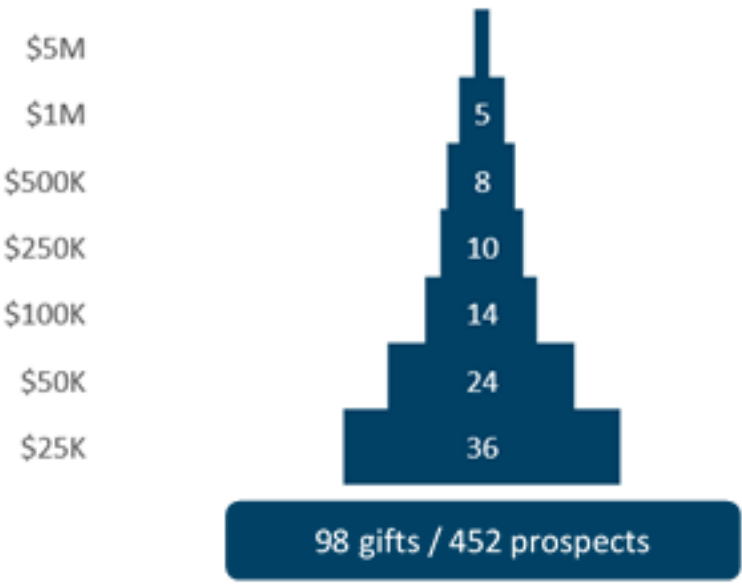
\$10 Million **Broad** Gift Pyramid



\$10 Million **Narrow** Gift Pyramid



\$20 Million Gift Pyramid



# \$10 Million Broad Gift Table

\$10 Million Broad Gift Table							
Gift Level	Gifts Needed	Prospects Needed	Prospects Identified	Prospect Surplus	Total	Cumulative Total	Cumulative % of Total
\$1M	1	4	2	-2	\$1.0M	\$1.0M	10%
\$500K	2	8	14	6	\$1.0M	\$2.0M	20%
\$250K	8	32	253	221	\$2.0M	\$4.0M	40%
\$100K	20	80	739	659	\$2.0M	\$6.0M	60%
\$50K	30	150	986	836	\$1.5M	\$7.5M	75%
\$25K	60	300	2,763	2,463	\$1.5M	\$9.0M	90%
\$10K	100	500	11,257	10,757	\$1.0M	\$10.0M	100%
<b>Total</b>	<b>221</b>	<b>1,074</b>	<b>16,014</b>	<b>14,940</b>	<b>\$10.0M</b>	<b>\$10.0M</b>	<b>100%</b>

# \$10 Million Broad Gift Table – by Likelihood

\$10 Million Broad Gift Table by Prospect Likelihood							
Gift Level	Gifts Needed	Prospects Needed	High Likelihood		Medium Likelihood		Low Likelihood
			Identified	Surplus	Identified	Surplus (High + Medium)	Additional to Qualify & Cultivate
\$1M	1	4	1	-3	0	-3	1
\$500K	2	8	0	-8	1	-7	13
\$250K	8	32	2	-30	26	-4	225
\$100K	20	80	15	-65	80	15	644
\$50K	30	150	14	-136	128	-8	844
\$25K	60	300	44	-256	435	179	2,284
\$10K	100	500	153	-347	1,548	1,201	9,556
<b>Total</b>	<b>221</b>	<b>1,074</b>	<b>229</b>	<b>-845</b>	<b>2,218</b>	<b>1,373</b>	<b>13,567</b>

# \$10 Million Narrow Gift Table

\$10 Million Narrow Gift Table							
Gift Level	Gifts Needed	Prospects Needed	Prospects Identified	Prospect Surplus	Total	Cumulative Total	Cumulative % of Total
\$1M	1	4	2	-2	\$1.0M	\$1.0M	10%
\$500K	4	16	14	-2	\$2.0M	\$3.0M	30%
\$250K	12	48	253	205	\$3.0M	\$6.0M	60%
\$100K	18	72	739	667	\$1.8M	\$7.8M	78%
\$50K	22	110	986	876	\$1.1M	\$8.9M	89%
\$25K	30	150	2,763	2,613	\$0.75M	\$9.65M	97%
\$10K	35	175	11,257	11,082	\$0.35M	\$10.0M	100%
<b>Total</b>	<b>122</b>	<b>575</b>	<b>16,014</b>	<b>15,439</b>	<b>\$10.0M</b>	<b>\$10.0M</b>	<b>100%</b>

# \$10 Million Narrow Gift Table – by Likelihood

\$10 Million Narrow Gift Table by Prospect Likelihood							
Gift Level	Gifts Needed	Prospects Needed	High Likelihood		Medium Likelihood		Low Likelihood
			Identified	Surplus	Identified	Surplus (High + Medium)	Additional to Qualify & Cultivate
\$1M	1	4	1	-3	0	-3	1
\$500K	4	16	0	-16	1	-15	13
\$250K	12	48	2	-46	26	-20	225
\$100K	18	72	15	-57	80	23	644
\$50K	22	110	14	-96	128	32	844
\$25K	30	150	44	-106	435	329	2,284
\$10K	35	175	153	-22	1,548	1,526	9,556
<b>Total</b>	<b>122</b>	<b>575</b>	<b>229</b>	<b>-346</b>	<b>2,218</b>	<b>1,872</b>	<b>13,567</b>

# \$10 Million Gift Tables Comparison

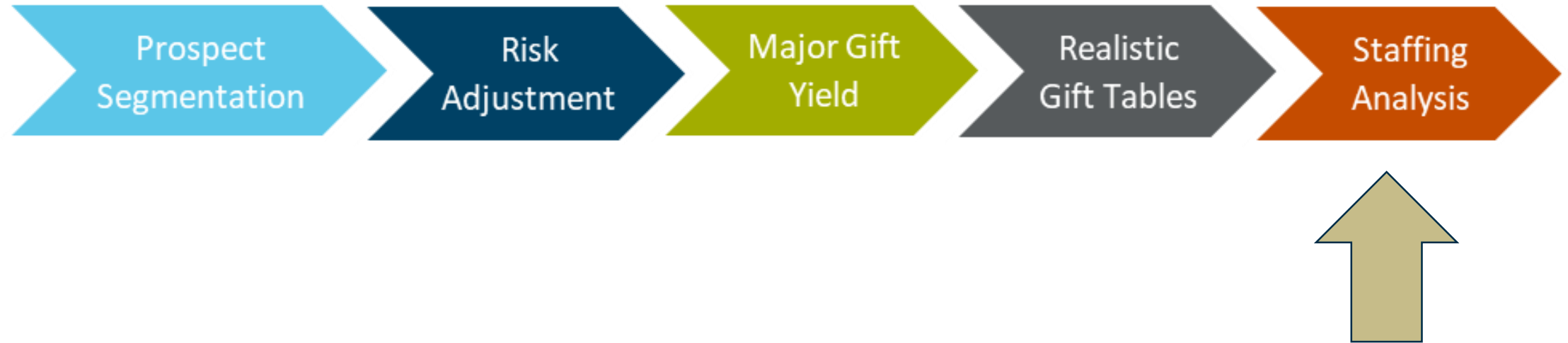
Measure	\$10M Broad	\$10M Narrow	Difference
\$1M Gifts	1	1	-
\$500K Gifts	2	4	2 more
\$250K Gifts	8	12	4 more
\$100K Gifts	20	18	2 fewer
\$50K, \$25K, and \$10K Gifts	190	87	103 fewer
<b>Total Gifts Needed</b>	<b>221</b>	<b>122</b>	<b>99 fewer</b>
<b>Prospects Needed</b>	<b>1,074</b>	<b>575</b>	<b>499 fewer</b>
<b>Goal Achieved From Gifts of \$100K+</b>	<b>60%</b>	<b>78%</b>	<b>+18%</b>



# Gifts Tables Summary

Gift Tables Summary			
Measure	\$10M Broad	\$10M Narrow	\$20M
\$5M Gifts	0	0	1
\$1M Gifts	1	1	5
\$500K Gifts	2	4	8
\$250K Gifts	8	12	10
\$100K Gifts	20	18	14
\$50K Gifts	30	22	24
\$25K Gifts	60	30	36
\$10K Gifts	100	35	0
<b>Total Gifts Needed</b>	<b>221</b>	<b>122</b>	<b>98</b>
<b>Prospects Needed</b>	<b>1,074</b>	<b>575</b>	<b>452</b>
Percent of goal from lead gift(s)	10%	10%	25%
Goal achieved from gifts of \$100K+	60%	78%	90%

# Yield Analysis Methodology





# Staffing Analysis

At optimal productivity levels, Westfield State will need at least 5 FTEs dedicated to major and principal gift fundraising.

Productivity Assumptions				
Role	Portfolio Size	Visits per Month	Solicitations per Month	Closure Rate
Principal Gift Officers	75	5	1	70%
Experienced Major Gift Officers	125	10	1.5	35%
New Major Gift Officers	100	12	1	25%

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# Recommendations

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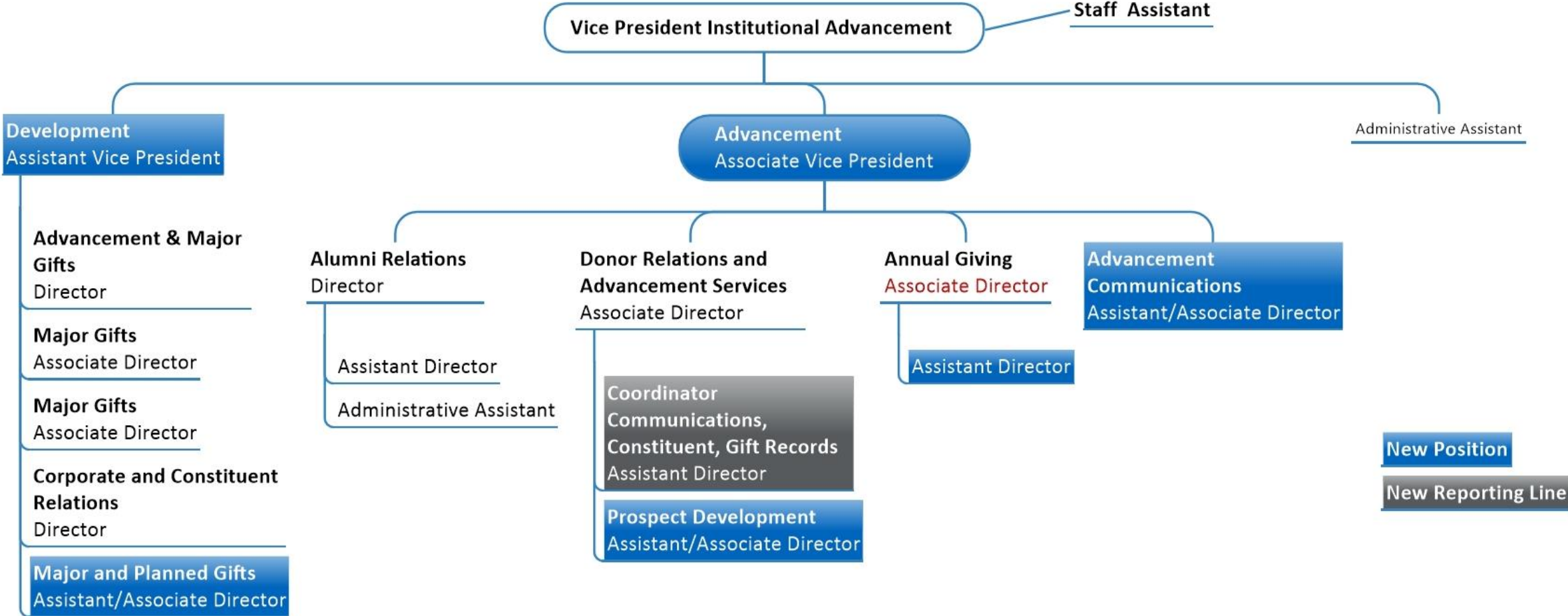
# Overall Recommendations

- Build and test a case for support for WSU.
- Develop a comprehensive multi-year plan for advancement.
- Create key success indicators:
  - Conduct a database audit and set metrics for improvement in data quality.
  - Meet new development officer metrics for success as outlined in the Yield Analysis.
  - Identify, track, and set goals for key alumni performance indicators, including alumni engagement levels and the relationship between alumni engagement and alumni giving.

# Overall Recommendations

- Create strategic engagement plans for key constituencies and programs including:
  - A new comprehensive alumni engagement strategy.
  - A comprehensive stewardship plan.
  - A training and engagement plan to enhance the fundraising capacity of the president, senior leaders, the Board of Trustees and the Foundation directors, and other volunteers.
- Hire key staff across development functions.

# Advancement Staffing



**New Position**  
**New Reporting Line**

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# Next Steps

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# Next Steps



Internal Assessment  
*With Trends Analysis*



Benchmarking



Yield Analysis



Campaign  
Readiness Report



Develop the  
Preliminary Case  
for Support



External Interviews



Online Survey



Campaign Planning  
Report

# Questions and Conversation

THANK YOU!

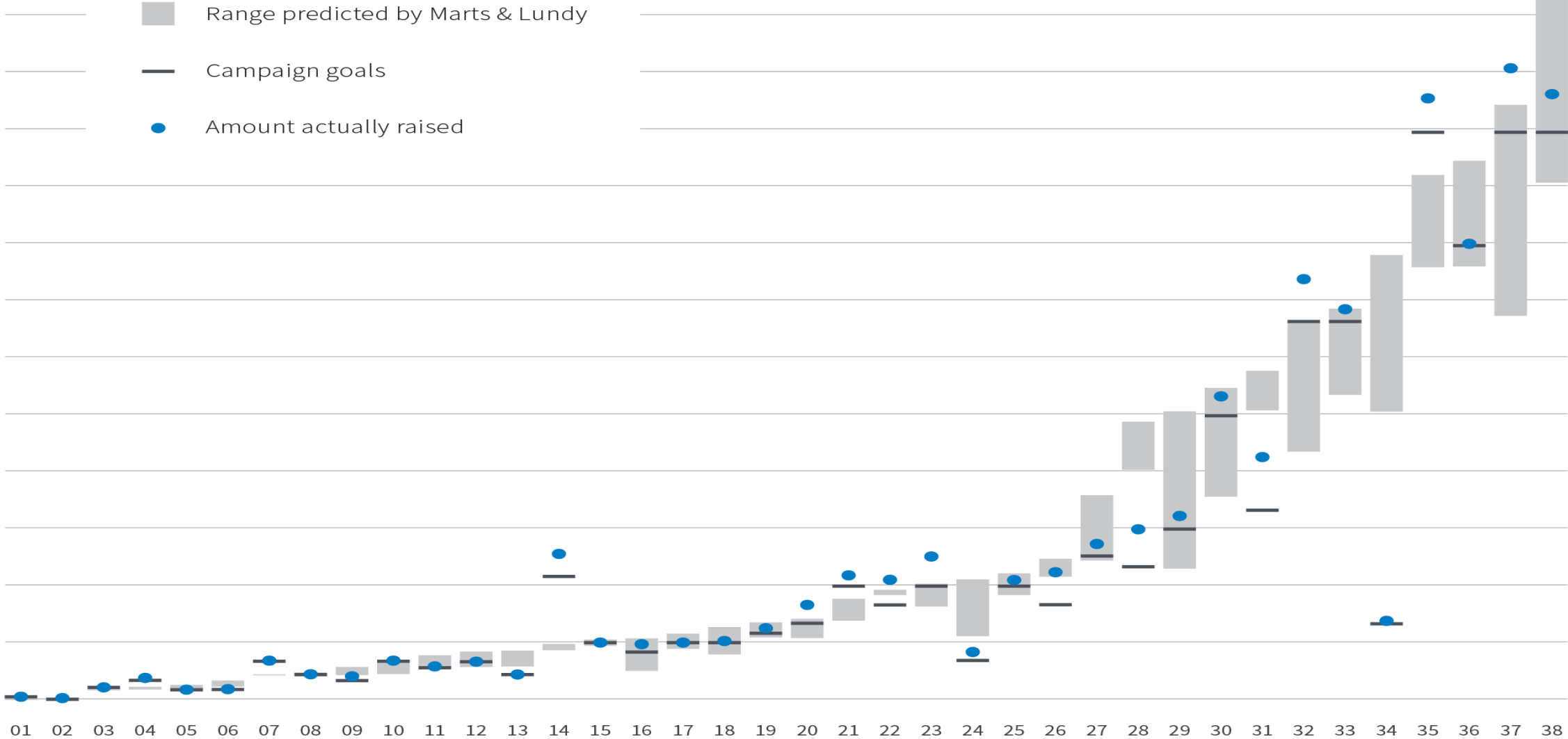
**Marts&Lundy**



# Prospect Segmentation Confirmation

Statistics by Likelihood Rating	High	Medium	Low
Prospects	220	2,233	13,561
Total Lifetime Giving	\$3.9M	\$2.1M	\$0.9M
Average Lifetime Giving	\$17,700	\$950	\$65
Average Largest Gift	\$11,350	\$550	\$80
Average Number of Gifts	45	9	1.5
Average Giving Last Three Years	\$14,828	\$254	\$2
Average Time Since Last Gift	11 months	30 months	14.5 years
Donors in Last Three Years	206 (94%)	1,325 (59%)	0 (0%)
Donors Lifetime	220 (100%)	2,233 (100%)	5,653 (42%)

# Significance of the Capacity Analysis



FULL NAME  
(AS IT WILL APPEAR ON SOCIAL MEDIA!)

[Redacted area for full name]

Do we have permission to share your photo on social media?      Yes  No

RELATIONSHIP TO WESTFIELD STATE  
(CHECK ALL THAT APPLY)

ALUMNI      CLASS YEAR: \_\_\_\_\_

FACULTY/STAFF      POSITION: \_\_\_\_\_

BOARDMEMBER      YEARS SERVED/POSITION: \_\_\_\_\_

PARENT

OTHER      PLEASE SPECIFY: \_\_\_\_\_

WHY DO YOU GIVE BACK TO WESTFIELD STATE?

[Redacted area for why you give back to Westfield State]

WHAT IS THE MOST MEMORABLE MOMENT YOU  
HAVE OF WESTFIELD STATE?

[Redacted area for most memorable moment]

# Institutional Advancement DASHBOARD

July 1, 2019–September 30, 2019

## Highlights

The Westfield State Foundation received \$53,000 from the Massachusetts Teacher's Association in support of *As Schools Match Wits*.

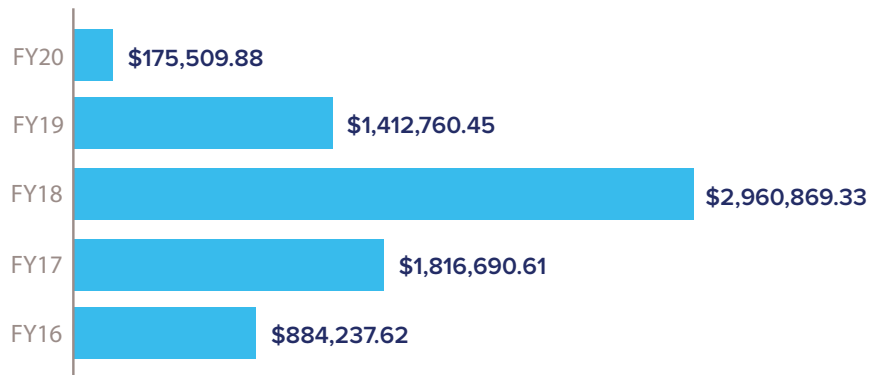
The Westfield State Foundation is also a finalist for a \$40,000 grant from the Beveridge Foundation for the Westfield Pride Scholarship.

Scholarship Golf Tournament was one of our best in terms of number of players. Gross revenues topped \$60,000.

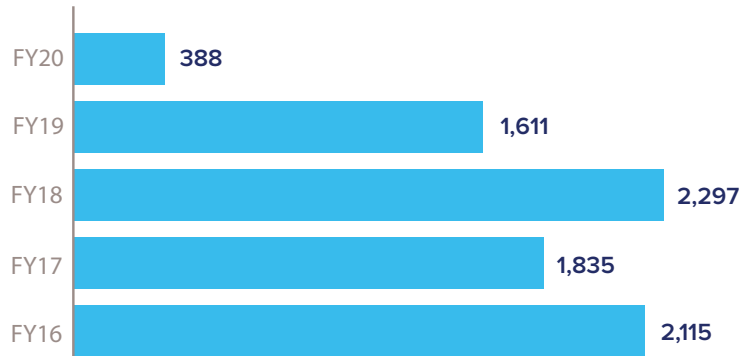
Philanthropic Friday is a new social media initiative that will feature a weekly social media post using quotes from students, alumni, faculty, staff, and friends of the University on why they give back to Westfield along with information on the impact of those donations.

Westfield State Foundation is proud to have awarded \$277,259.60 in scholarship funds for the 2018–2019 academic year. We have 11 new scholarships that are awarded for the first time in the 2019–2020 academic year.

### TOTAL DOLLARS



### TOTAL DONORS



\* In the two bar charts above, the data in FY19 and FY20 ONLY includes donations. The data for FY18, FY17, and FY16 includes donations and non-gift income.

	Gifts of \$5,000+	Median Gift	Average Gift
FY20	8	\$25.00	\$220.21
FY19	61	\$25.00	\$368.48
FY18	48	\$40.00	\$993.81

	Volunteer Boards	Population	Dollars	Donors	Average Gift	Participation
<b>Board of Trustees</b>						
FY20	10		\$0.00	0	\$0.00	0.00%
FY19	11		\$15,065.00	8	\$1,369.55	72.73%
<b>Foundation Board</b>						
FY20	26		\$1,450.00	4	\$107.41	15.38%
FY19	27		\$17,513.86	23	\$648.66	85.19%
<b>Alumni Association</b>						
FY20	15		\$0.00	0	\$0.00	0.00%
FY19	17		\$3,420.08	17	\$201.18	100.00%
<b>Cabinet</b>						
FY20	8		\$2,076.00	5	\$259.50	62.50%
FY19	9		\$14,345.00	9	\$1,593.89	100.00%

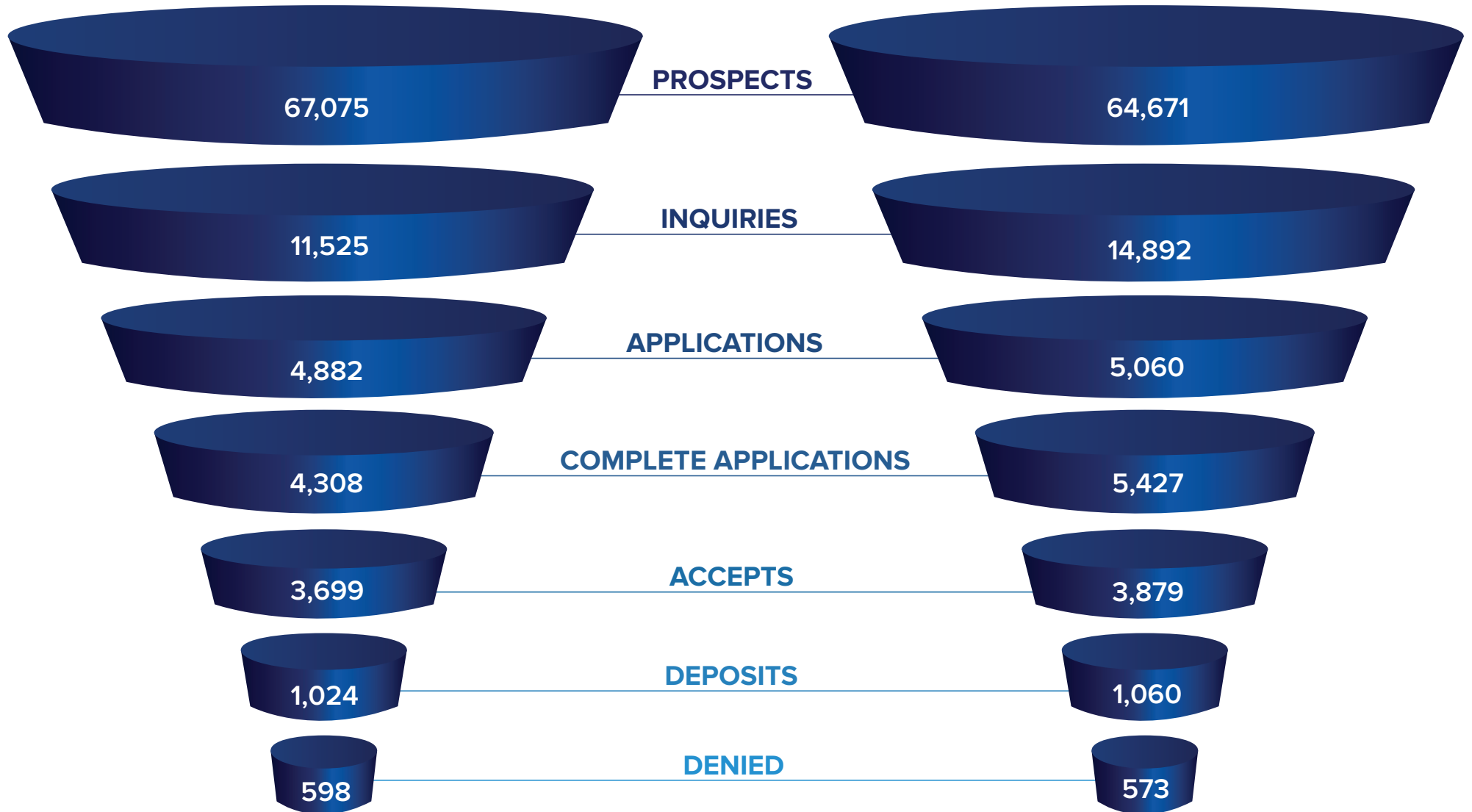
PLEASE NOTE: Single gifts that are exceptionally large or exceptionally small in comparison to the majority of the data are called outliers. These outliers are included in the calculations of the Average Gift and Median Gift in the two tables above, and thus may skew the results.

# ADMISSION FUNNEL REPORT — FIRST-YEARS

9/10/2019

## FALL 2018

## FALL 2019

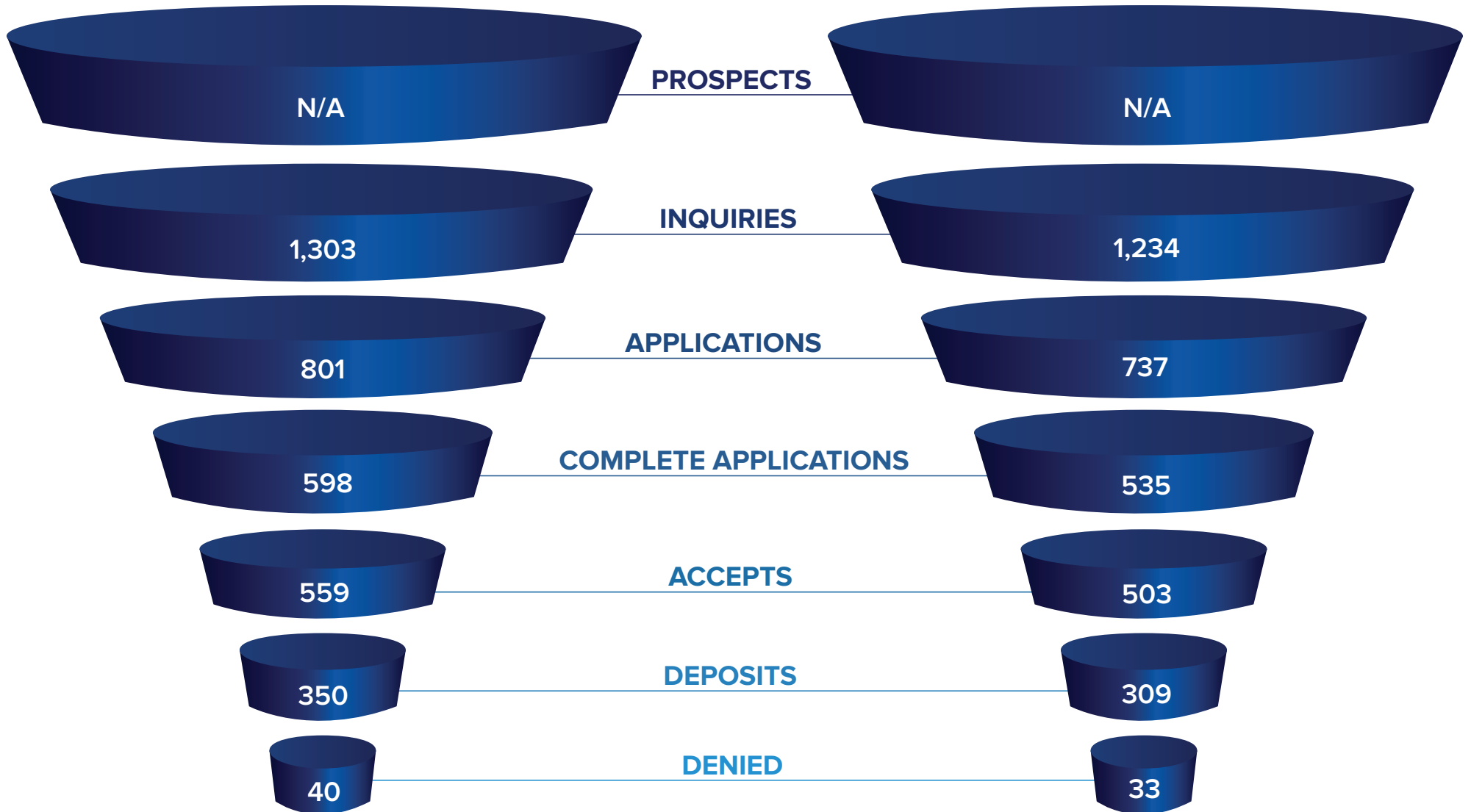


# ADMISSION FUNNEL REPORT — TRANSFERS

9/10/2019

## FALL 2018

## FALL 2019





# Financial Aid Optimization Analysis – Proposed Aid Policies

Westfield State University  
October 2019  
*Based on Preliminary Data as of 6/11*

Financial Aid

## 2019-20 Results



### Enrollment and Tuition Revenue Outcomes

#### Merit Awards

	SAT Min	GPA Min	2020 Amount
Presidential Merit	1270	3.75	\$4,000
Leadership	1220	3.50	\$2,000
Honors Book		3.50	\$750
Out of State Scholarship		3.00	\$5,000

*Merit is offered until budget is depleted*

#### Other Institutional Awards

	2020 Amount
Housing Grant	\$1,500
OWL	\$2,000
Summer Bridge	\$1,000
Employee/Dependent Waiver (FATW)	\$970

#### Need-Based Grant Aid

Need-based grant aid is offered to all students on the basis of demonstrated need, as defined by the FAFSA. The amount of the award varies by level of need, living status (on/off/at home) and state residence.

**1060**

Enrolled Freshmen

**\$1.8M**

Institutional Grant Aid

**\$10.1M**

Net Tuition Revenue

**15.2%**

Discount Rate

\*Estimated results using preliminary data from June 11, 2019.



## 2019-20 Aid Strategy Implemented in 2020-21



3

Estimated results if aid strategy is left unchanged for next year.

### Merit Awards

	SAT Min	GPA Min	2020 Amount
Presidential Merit	1270	3.75	\$4,000
Leadership	1220	3.50	\$2,000
Honors Book		3.50	\$750
Out of State Scholarship		3.00	\$5,000

*Merit is offered until budget is depleted*

### Other Institutional Awards

	2020 Amount
Housing Grant	\$1,500
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**1060**

Enrolled Freshmen

**\$1.9M**

Institutional Grant Aid

**\$10.4M**

Net Tuition Revenue

**15.5%**

Discount Rate

\*Assumes 3% increase in TFRB costs, same number of admits with a comparable distribution of academic preparedness and neediness as 2019-20.

# Proposed Policy Option #1



Reallocation of a smaller institutional aid budget, awarded primarily on the basis of merit; every admit receives a scholarship.

**High School GPA Points**

GPA of at Least	Points
0.01	2
2.7	4
2.87	6
3.02	8
3.16	10
3.3	12
3.45	14
3.61	16
3.8	18
4.02	20

**SAT Score Points**

SAT Score of at Least	Points
1	1
920	2
980	3
1020	4
1050	5
1080	6
1110	7
1150	8
1190	9
1250	10

**Academic Index**

Total Points of at Least	Academic Rank
1	1
10	2
15	3
20	4
25	5

**Merit Scholarships**

Academic Rank	Merit Scholarship
1	\$500
2	\$500
3	\$750
4	\$1,500
5	\$1,500

**Other Institutional Awards**

	2020 Amount
Housing Grant	\$1,500
OWL	\$2,000
Summer Bridge	\$1,000
Employee/Dependent Waiver (FATW)	\$970

**1072**

Enrolled Freshmen

**\$1.7M**

Institutional Grant Aid

**\$10.6M**

Net Tuition Revenue

**13.8%**

Discount Rate

\*Assumes 3% increase in TFRB costs, same number of admits with a comparable distribution of academic preparedness and neediness as 2019-20.

## Proposed Policy Option #2



Modest increase in institutional aid budget, allocated on the basis of merit and demonstrated need, yields better enrollment and revenue outcomes.

### High School GPA Points

GPA of at Least	Points
0.01	2
2.7	4
2.87	6
3.02	8
3.16	10
3.3	12
3.45	14
3.61	16
3.8	18
4.02	20

### SAT Score Points

SAT Score of at Least	Points
1	1
920	2
980	3
1020	4
1050	5
1080	6
1110	7
1150	8
1190	9
1250	10

### Academic Index

Total Points of at Least	Academic Rank
1	1
10	2
15	3
20	4
25	5

### Merit Scholarships

Academic Rank	Merit Scholarship
1	\$500
2	\$1,000
3	\$1,000
4	\$1,500
5	\$1,500

### Other Institutional Awards

	2020 Amount
Housing Grant	\$1,500
OWL	\$2,000
Summer Bridge	\$1,000
Employee/Dependent Waiver (FATW)	\$970

### Need-Based Grant Aid

Commit to meeting at least **15%** of demonstrated need (as defined by the FAFSA) for all admits using institutional and governmental gift aid dollars to fulfill the commitment.

**1117**

Enrolled Freshmen

**\$2.0M**

Institutional Grant Aid

**\$10.8M**

Net Tuition Revenue

**15.7%**

Discount Rate

\*Assumes 3% increase in TFRB costs, same number of admits with a comparable distribution of academic preparedness and neediness as 2019-20.

## Proposed Policy Option #3



Considerable increase in financial aid expenditures yields the best enrollment and revenue outcomes.

**High School GPA Points**

GPA of at Least	Points
0.01	2
2.7	4
2.87	6
3.02	8
3.16	10
3.3	12
3.45	14
3.61	16
3.8	18
4.02	20

**SAT Score Points**

SAT Score of at Least	Points
1	1
920	2
980	3
1020	4
1050	5
1080	6
1110	7
1150	8
1190	9
1250	10

**Academic Index**

Total Points of at Least	Academic Rank
1	1
10	2
15	3
20	4
25	5

**Merit Scholarships**

Academic Rank	Merit Scholarship
1	\$1,500
2	\$2,000
3	\$2,000
4	\$2,500
5	\$2,500

**Other Institutional Awards**

	2020 Amount
Housing Grant	\$1,500
OWL	\$2,000
Summer Bridge	\$1,000
Employee/Dependent Waiver (FATW)	\$970

**Need-Based Grant Aid**

Commit to meeting at least **20%** of demonstrated need (as defined by the FAFSA) for all admits using institutional and governmental gift aid dollars to fulfill the commitment.

**1281**

Enrolled Freshmen

**\$3.4M**

Institutional Grant Aid

**\$11.4M**

Net Tuition Revenue

**22.8%**

Discount Rate

\*Assumes 3% increase in TFRB costs, same number of admits with a comparable distribution of academic preparedness and neediness as 2019-20.



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THE 2019 SURVEY OF ADMISSIONS LEADERS:

## THE PRESSURE GROWS

*“The deadline for filling a class keeps getting pushed back. **Fifty-two percent of colleges did not meet their goals by July 1.** And only **37 percent achieved their goals by May 1.**”*

INSIDE  
HIGHER ED



# 3 Shifts to Evolve Enrollment Marketing

**AUDIENCE**

**CHANNELS**

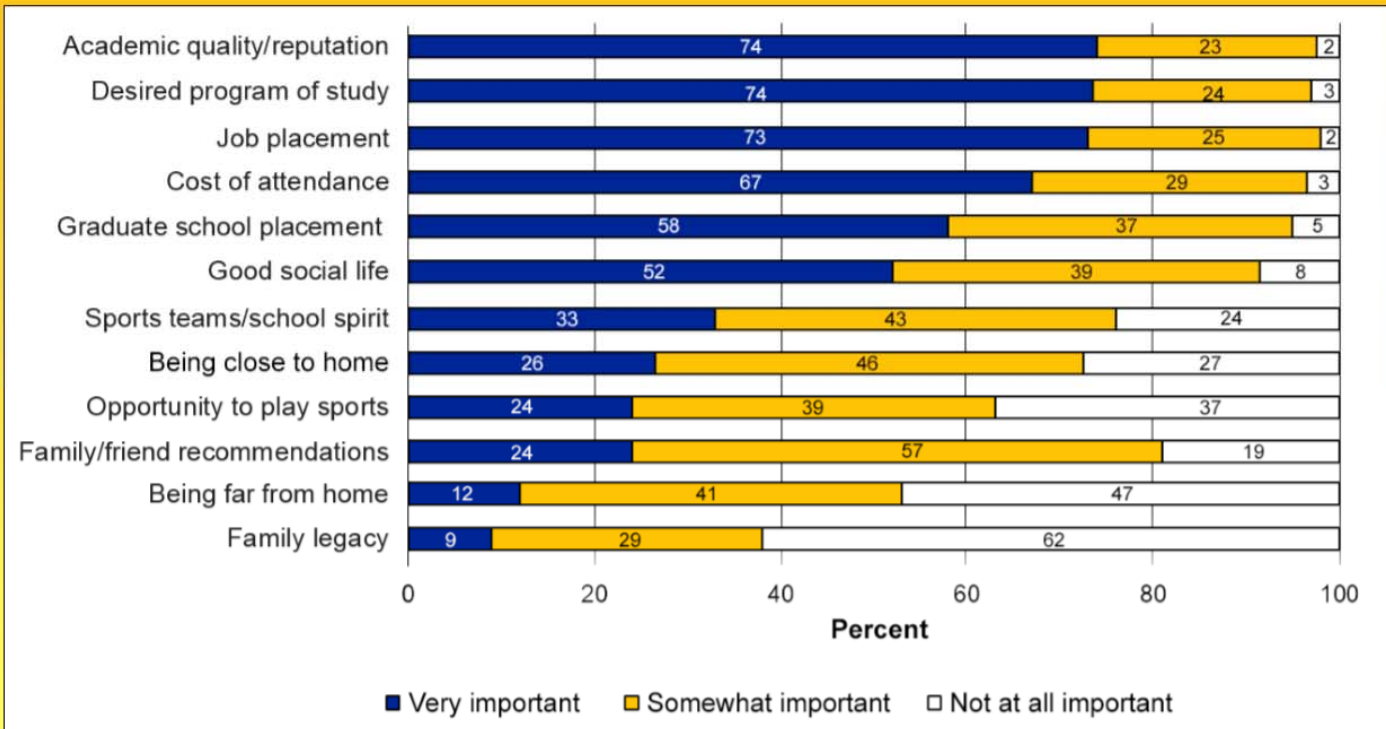
**TECHNOLOGY**

# AUDIENCE

- ▶ The most **diverse** population in American history
- ▶ Increasing **access** (college attendance) is the only way to increase the enrollment of traditional age students
  - ▶ Otherwise, > 25-year old's drive enrollment growth (Adult, Online, Graduate, Transfer)
- ▶ Students and parents across all demographics are in **social media** audiences
- ▶ **Academics, reputation, outcomes** are the top influencers to student college selection
- ▶ **Family** has significant influence on student selection, much higher than any other influencer.
- ▶ Focus on the **yet-to-be known** audience
  - ▶ Own search engine results page (SERP), social media platforms, and online resources for families/students to build audiences
- ▶ Today's audiences are **mobile-first** in accessing information and communication
  - ▶ Families with lower income are more likely to have a mobile device than any other



**FIGURE 1. Percentage distribution of students' ratings of the importance of factors that influence college choice among fall 2009 ninth-graders in spring 2012**



NOTE: Percentages may not sum to 100 due to rounding.

SOURCE: U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics. High School Longitudinal Study of 2009 (HSL:09) First Follow-up Public-Use Data File (NCES 2014-358).

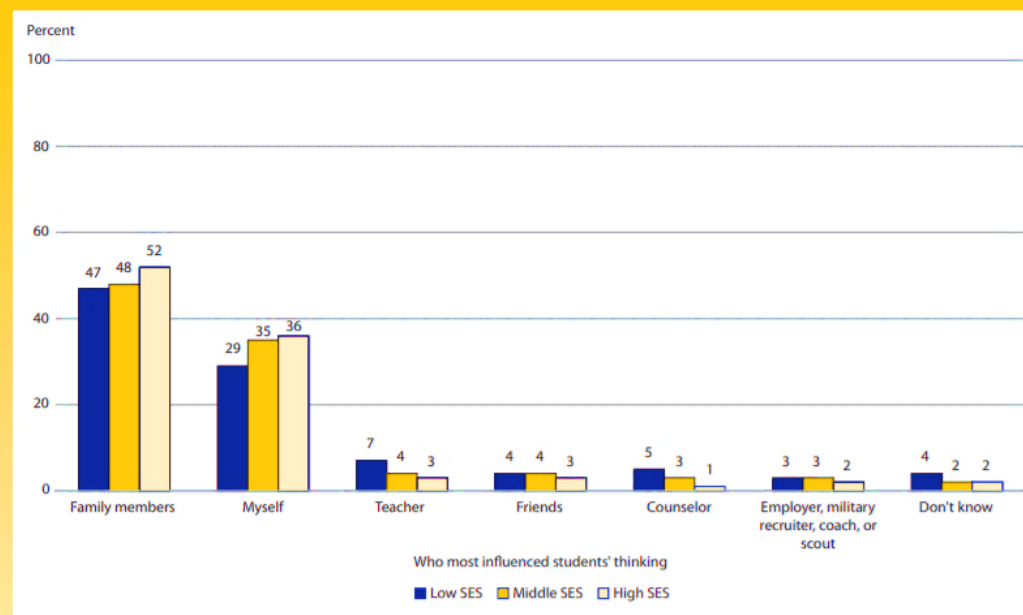
# Family is the top influencer in a HS student's choice.

- ▶ Influencing the influencers is critical in any enrollment marketing strategy.

## INFLUENCES ON EDUCATION DECISIONS, BY SES BACKGROUND

FIGURE 4.

Percentage distribution of fall 2009 public school ninth-graders as of spring 2012, according to student reports of who most influenced their thinking about education after high school, by socioeconomic status (SES): 2012



NOTE: Family members includes response categories for your parents and another family member; Myself includes yourself and no one in particular; Counselor includes high school counselor and counselor hired by your family to help you prepare for college admission. Standard errors for estimates can be found at <http://nces.ed.gov/surveys/ctes/tables/H167.asp>. Detail may not sum to totals because of rounding.

SOURCE: U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics, High School Longitudinal Study of 2009 (HLS:09), First Follow-up Restricted-Use Data File.

## A DIGITAL SNAPSHOT OF TODAY'S PROSPECTIVE COLLEGE STUDENT: v



Most students say that seeing listings for a potential program on **SEARCH ENGINES** like Google, Yahoo, or Bing is effective or very effective.



The top **TWO SOURCES** of info-gathering for students:

- 1 **SCHOOL WEBSITES**
- 2 **INTERNET SEARCH ENGINES**

**14%** of students rely on **COLLEGE SEARCH SITES** like **eLearners.com**.



## HOW FAST DO STUDENTS THINK A COLLEGE SHOULD RESPOND TO THE FIRST INQUIRY? v



**30%** within 24 hours (even on the weekend)



**27%** by the next business day

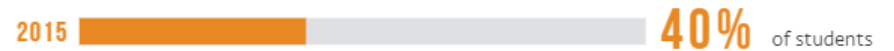


**10%** within an hour of inquiry



**94%** within two days is sufficient

## STUDENTS WHO SUBMIT THEIR APPLICATIONS WITHIN FOUR WEEKS OF BEGINNING THE COLLEGE SEARCH: v

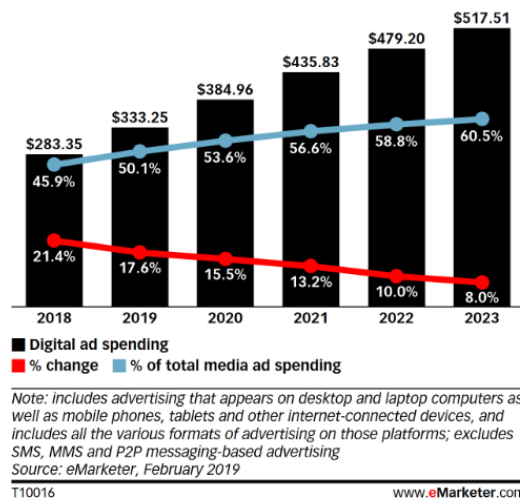


# CHANNELS

- ▶ **Mobile-first** is necessary for enrollment marketing communication.
- ▶ Integrating **social media** into enrollment marketing is not optional.
- ▶ **Digital media is the top** driver to student recruitment—building awareness, cultivating advocates, and driving conversion.
- ▶ **Email remains a top** marketing channel; it is highly effective when used personally and purposefully (real-time personalization).
- ▶ Digital budgets globally are **growing exponentially** to keep up with the rapid pace of the digital revolution.
- ▶ “Telephone landlines” are becoming obsolete and have **lost efficacy** in surveying.
- ▶ The last 10 years has seen a **dramatic change** in how people communicate and seek information.

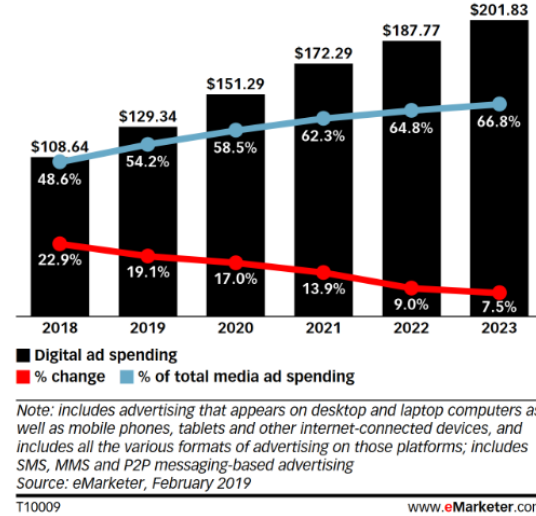
# Digital Marketing

**Digital Ad Spending Worldwide, 2018-2023**  
billions, % change and % of total media ad spending



In some countries, including the UK, China, Norway and Canada, digital has already become the dominant ad medium. This year, the US and the Netherlands will join that group, with digital accounting for 54.2% and 52.6% of total ad spend, respectively. In Russia, half of total ad investments will go to digital.

**Digital Ad Spending in the US, 2018-2023**  
billions, % change and % of total media ad spending



**KEY STAT:** In 2019, US advertisers will spend \$129.34 billion, or 54.2% of their media ad budgets, on digital ads. By 2023, that figure will reach 66.8%.



## Communication weighs heavily in the enrollment decision



of students who received personalized communications during their application process **agree that it was an important factor in their choice of school**



of students who applied to multiple colleges **decided against attending a school because of poor communication** during the application process

