



INDIANA UNIVERSITY BLOOMINGTON



Utilizing Organizational Structure and
Technology to Enhance Your Market Position

Presentation Overview

- Enrollment Management and the Student Lifecycle – Roger Thompson
- Need for Strategic Change – David Johnson
- New Office of Scholarships: Awarding, Marketing & Recruitment – Sarah Booher
- Results of New Programs – Roger Thompson
- Questions? Comments?



Office of Enrollment Management

prior to July 2007

Organizations which comprise our Enrollment Management Division included:

- Admissions
- Administration
- Enrollment Planning and Research
- First Year Experience Programs
- Registrar
- Student Financial Assistance
- Systems Design and Development

There was no home for the marketing or communication of scholarships at IU. We needed a strategic change.



Student Lifecycle

Strategic Enrollment Management focuses on the student services areas which impact students' initial and continued enrollments and beyond.

Scholarships play an important role in the Student Lifecycle.



STUDENT LIFECYCLE



Four 2008 Recruitment Goals

- Improve the **quality** of the freshman class as defined by grade point average and standardized test scores.
- Increase the **diversity** of the freshman class as defined by ethnicity and social economic status.
- Increase the **international** presence of Indiana University.
- Keep IU **affordable**.



Need for a Strategic Change in Scholarships at IU

Prior to July 2007, the IU Scholarship functions were:

- Primarily back office processing functions.
- Primarily focused on out-of-state students.
- Not leveraged fully for recruitment of high ability students.
- Not providing maximum fiscal internal control through separation of duties.
- Using various criteria for awarding and renewal.



IU Scholarship Marketing and Communication

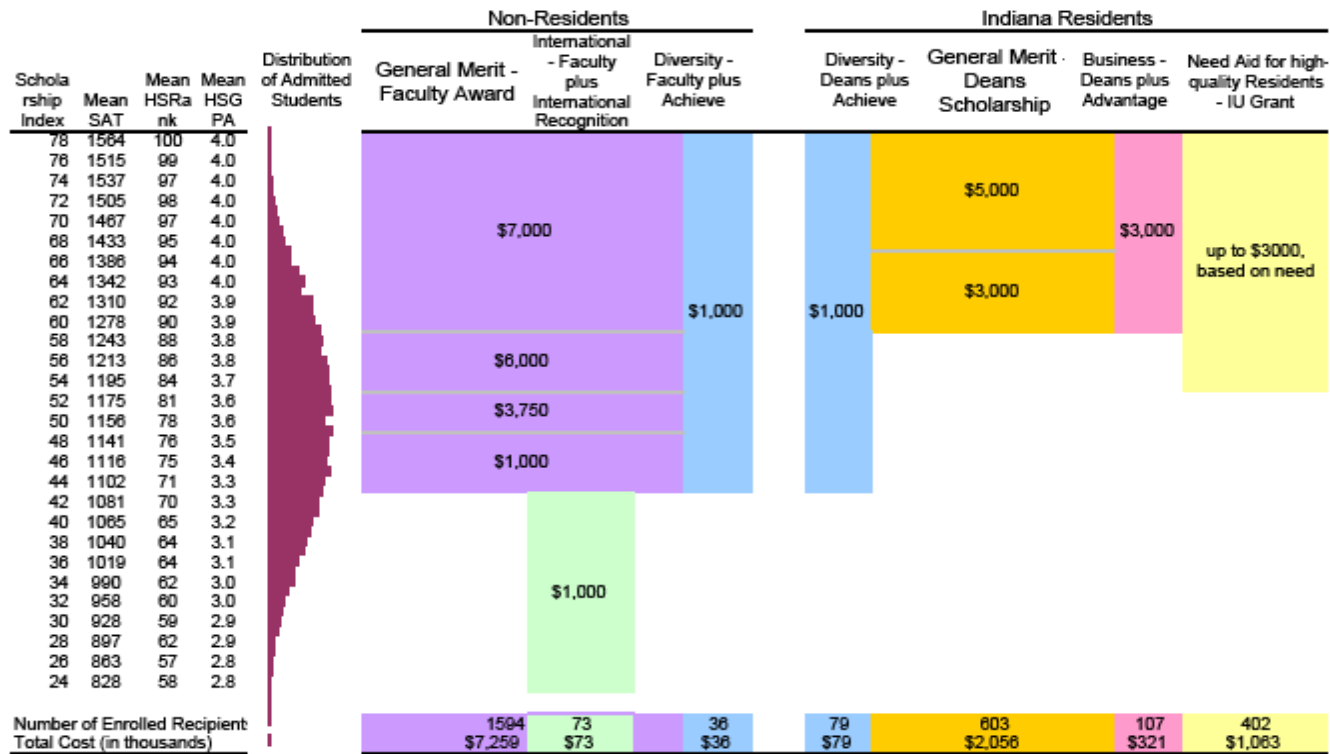
IU Scholarship Marketing and Communication Plan should be:

- Aligned with recruitment and enrollment goals.
- Presented in an easily understood manner to students and parents.
- Coordinated and applied strategically.
- Widely published.
- An important part of our proactive student services.
- Based on high standards and the principle that quality attracts quality.
- Based on continual outcome assessment.



Scholarship awarding index prior to July 2007

OEM Recruitment Scholarships based on the Scholarship Index, Award Criteria and Amounts, Fall 2006 cohort



Strategic Change for Scholarships

Strategically use data to inform the practice:

- Change parameters for scholarships based on yield rates given various scenarios.
- Choose the projection model that presents the #s and \$s desired.
- Examine scholarship data and modify the scholarship awarding criteria to meet recruitment and marketing goals.



OEM Scholarship Parameters for 2008

Table 1: Standards for 2008 IU Excellence, IU Distinction, IU Prestige, and IU Recognition Scholarships.

Indiana Residents				
ACT	SAT	HIGH SCHOOL GPA		
		≥ 3.75	3.70 - 3.74	3.60 - 3.69
≥ 29	≥ 1300	IU Excellence \$8,000		
28	1250-1290	IU Prestige \$5,000		
25-27	1150-1240	IU Recognition \$2,000		
Non-Residents				
ACT	SAT	HIGH SCHOOL GPA		
		≥ 3.75	3.70 - 3.74	3.60 - 3.69
≥ 29	≥ 1300	IU Distinction \$8,000 Award		
28	1250-1290	IU Prestige \$5,000		
25-27	1150-1240	IU Recognition \$2,000		



As we Market and Communicate about Scholarships at IU...

- We should keep in mind:
 - Quality of student body
 - Diversity
 - International presence
 - Affordability



As a side note, we work to balance between Need-based and Merit-based Scholarships

	Need	Merit
21 st Century Scholars Covenant	X	
Pell Promise Program	X	
IU Excellence & Distinction Award		X
IU Prestige Award		X
IU Recognition Award		X



Technology: Customer Relationship Management (CRM)



- The initial phase of the connect project occurred in August, 2008 and involved team members from Admissions, Scholarship, Orientation Programs and Registrar.
- Each unit's pilot project was an e-mail message to a targeted group of prospective or current students.
- Since the initial pilot additional mailings have gone out for several offices, including OSFA.
- In the works are plans for VIP web pages to push out personalized, targeted content to specific groups, and implementation of other product features that we have not yet utilized.



Technology: New scholarship application, recommending, and awarding system



- Multi-phase scholarship application, recommendation, and award processing system.
- Partnership with UITS, Budgetary Affairs, IU Foundation, SES and other campus and system offices.
- OEM project team includes participants from Admissions, OSFA, Scholarships, and SDD Operations. Functional Project Management is provided by the SDD Director.



SEM Strategy Defined

SEM centers on the **integration** and improvement of traditional student services, such as recruitment, admissions, **financial aid**, registration, orientation, academic support, and retention. It is informed by demographic and institutional **research**, and advanced by media messages and **public relations**. Ideally, SEM embraces all departments and functions in a comprehensive framework to best serve the student and hence the institution.”

-AACRAO, *What is SEM?*

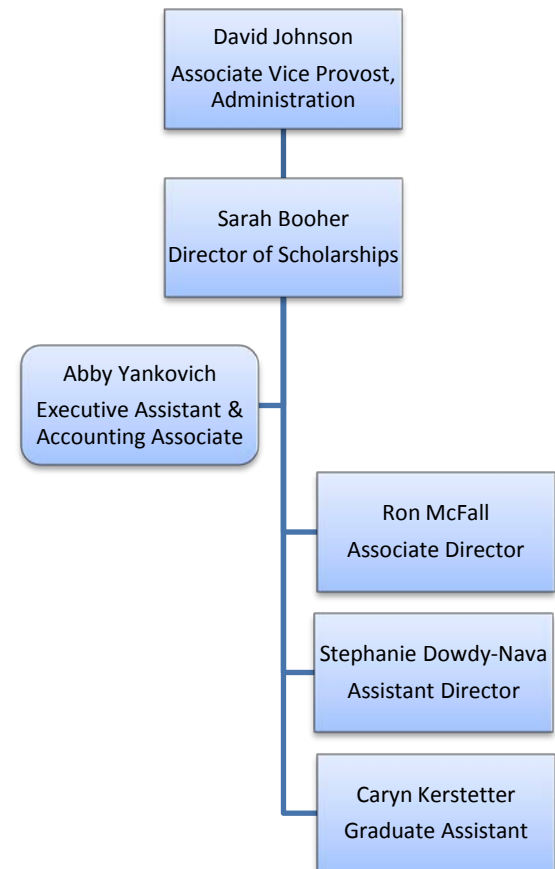
<http://www.aacrao.org/sem13/whatIsSEM.htm>

Now we move from Strategy to Awarding, Marketing, and Recruitment...



New Office of Scholarships: Awarding, Marketing & Recruitment

- Creation of the Office of Scholarships
Spring 2007
- Director Hired
July 2007
- Assessment & Strategic Planning;
Outreach to Key Partners
Summer/Fall 2007
- Build Team
November 2007-January 2008
- Get to Work



Mission Statement

The Office of Scholarships provides opportunities for academically talented students to **achieve** their aspirations through the pursuit of a college education.

We are committed to collaborating with university and community partners, promoting **diversity and accessibility** in higher education, creating **innovative** recruitment initiatives, and fostering an environment of recognition and excellence **at Indiana University.**



achieve

\ə'chēv\

Function: verb

1. to carry out successfully: accomplish
2. to get or attain as the result of exertion: reach
3. to attain a desired end or aim: become successful

achieve@indiana.edu



Year in Review & Future Initiatives

- Restructure Scholarships
- Communication & Outreach
- Operations & Awarding
- Scholarship Programs
- Recruitment Initiatives
- Future Initiatives



Communication and Outreach

- Scholarships Website
- 50,000 general brochures
- 27,000 personalized brochures
- 2,027 high school mailings
- 8,500 personalized congratulatory pieces



Recruitment Initiatives

- VIP Visits (Seniors)
 - 100% of VIPs applied to IU
 - 100% admitted
 - 75% paid the deposit
- IU Game Days
 - 83% who attended applied to IU
 - 99% admitted
 - 74% paid the deposit



Recruitment Initiatives

- IU Scholars Reception
 - Invited scholarship recipients from the Monroe county area
 - 96% who attended paid the deposit
- 2009: 8 Regional Scholars Receptions
(5 for Seniors; 3 for Juniors)



Scholarship Advisory Committee

- A diverse team of academically talented scholars
 - Represent various IU scholarship programs
 - Provide insight into the college-selection process for top students
 - Help recruit other high-ability students to IU
 - Campus partner recommendations for 2008-09 SAC



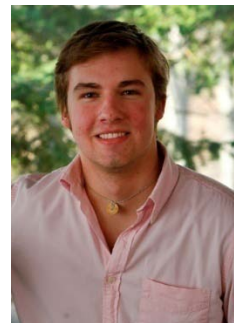
Susana Mota
Chicago, IL



Kyler Gray
Middletown, IN



Dominique McGee
Indianapolis, IN



Jacob Sherry
New Orleans, LA



Betsy Head
Bloomington, IN



'Congratulations!' Campaign

Congratulations, Indianapolis!

You have 9,000,000 new reasons to feel proud.

Indiana University offered more than \$9,000,000
to incoming Indianapolis area freshmen for the fall of 2008.

Just imagine what else we have to offer.

www.scholarships.indiana.edu

 **INDIANA UNIVERSITY**
BLOOMINGTON



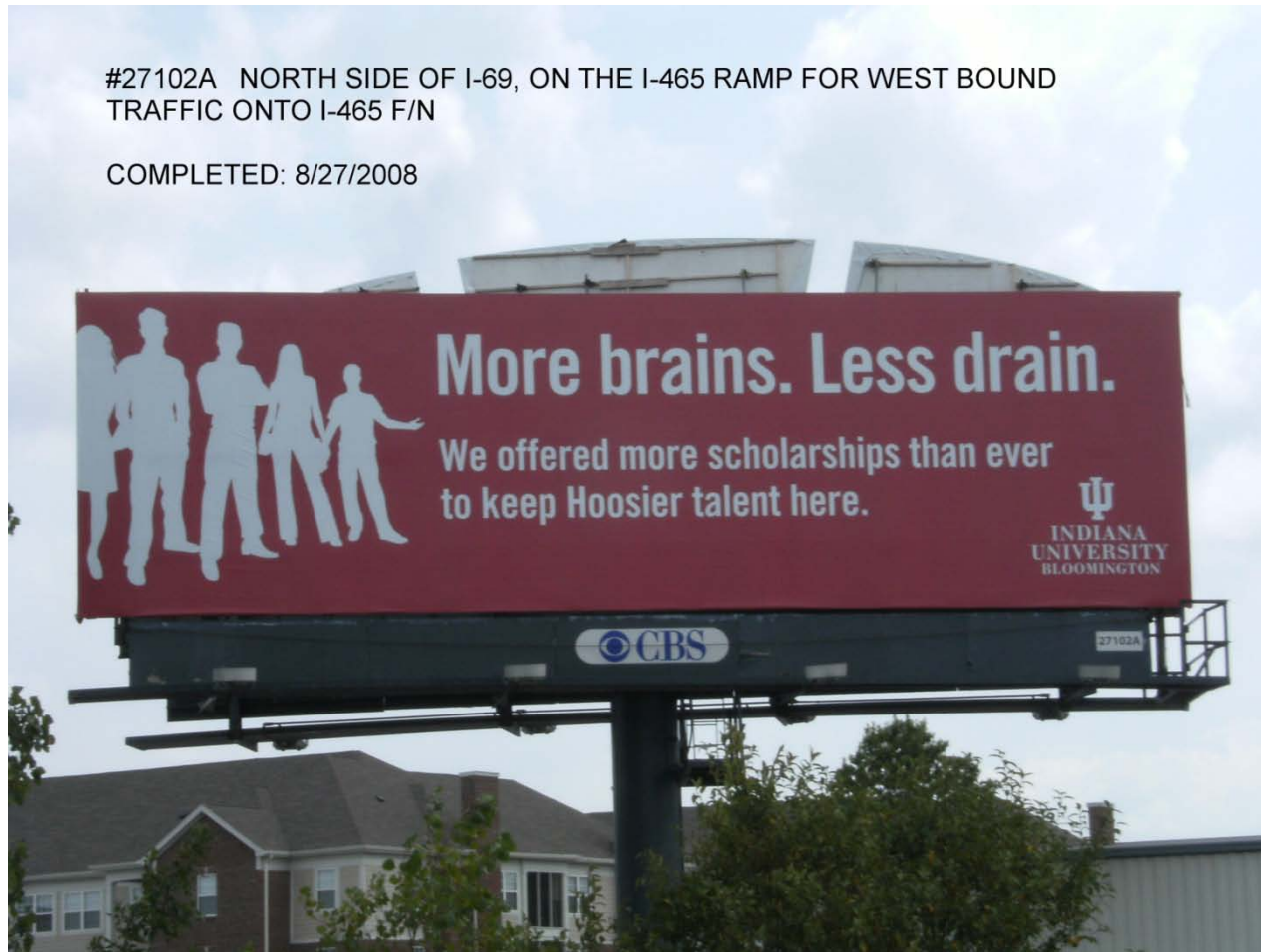
Indiana University Bloomington
Office of Enrollment Management



IU & Indiana Initiative – Reduce Brain Drain in the State

#27102A NORTH SIDE OF I-69, ON THE I-465 RAMP FOR WEST BOUND
TRAFFIC ONTO I-465 F/N

COMPLETED: 8/27/2008



Strategically Utilizing CRM for Recruitment & Marketing:

Congratulations!
You've Earned Your Stripes!

- Targeted top tier scholarship recipients
- Goal was to create excitement & recognition
- Mailing
- Congratulatory letter
- IU scarf
- Website
- Emails

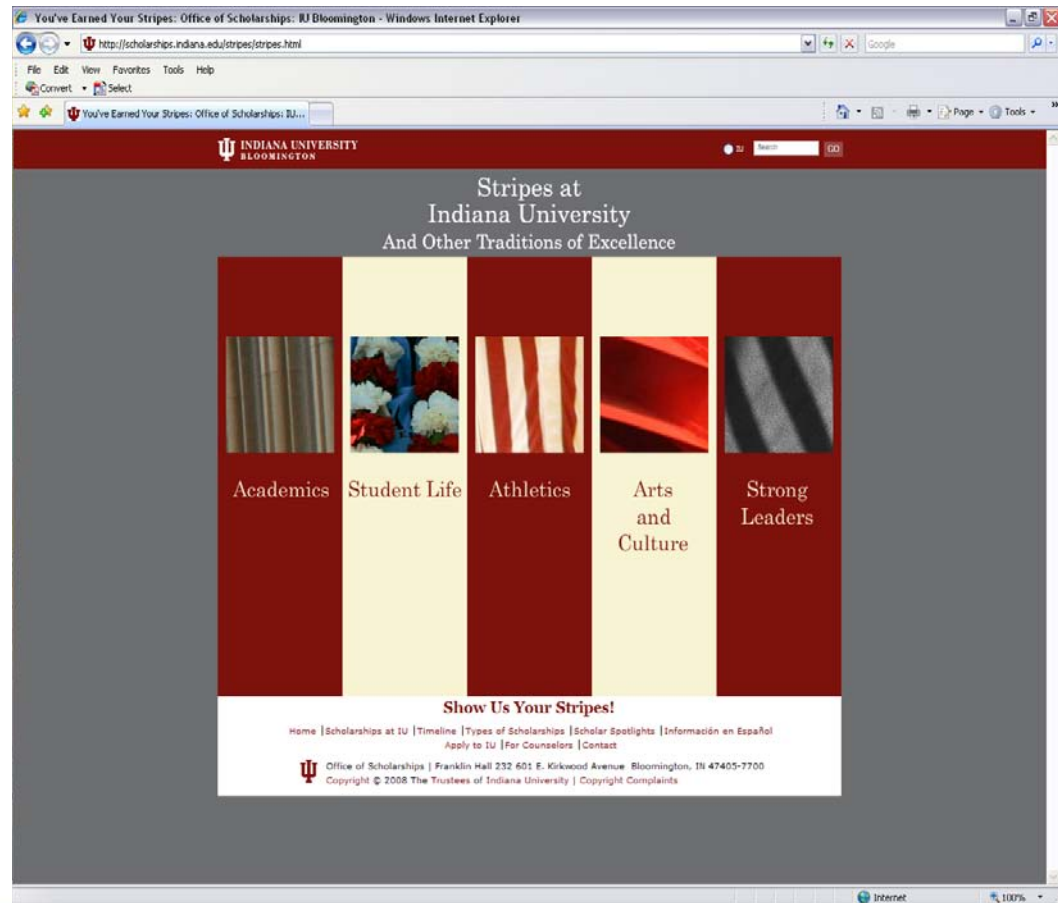


Congratulations!

You've Earned Your Stripes!

Website

- Created multi-media campaign
- Focus on highlighting IU traditions & areas of excellence
- Greater opportunities for targeted messaging, tracking, & assessment due to CRM



New Initiatives 2008-2009

- Spanish language brochure and web page
- National Achievement & National Hispanic Scholarships (awarding begins Fall 2009)
- Scholar Spotlights (Summer 2008)
- Scholar Blogs (October 2008)
- ‘You’ve Earned Your Stripes!’ Campaign (December 2008)
- Counselor Web Resources (January 2009)
- Consolidated Award Letter (March 2009)
- COMPASS expansion (for Fall 2009)
- Staffing: Student Intern (November 2008), Graduate Intern (January 2009), Technology/Data Staff Person (Spring 2009)

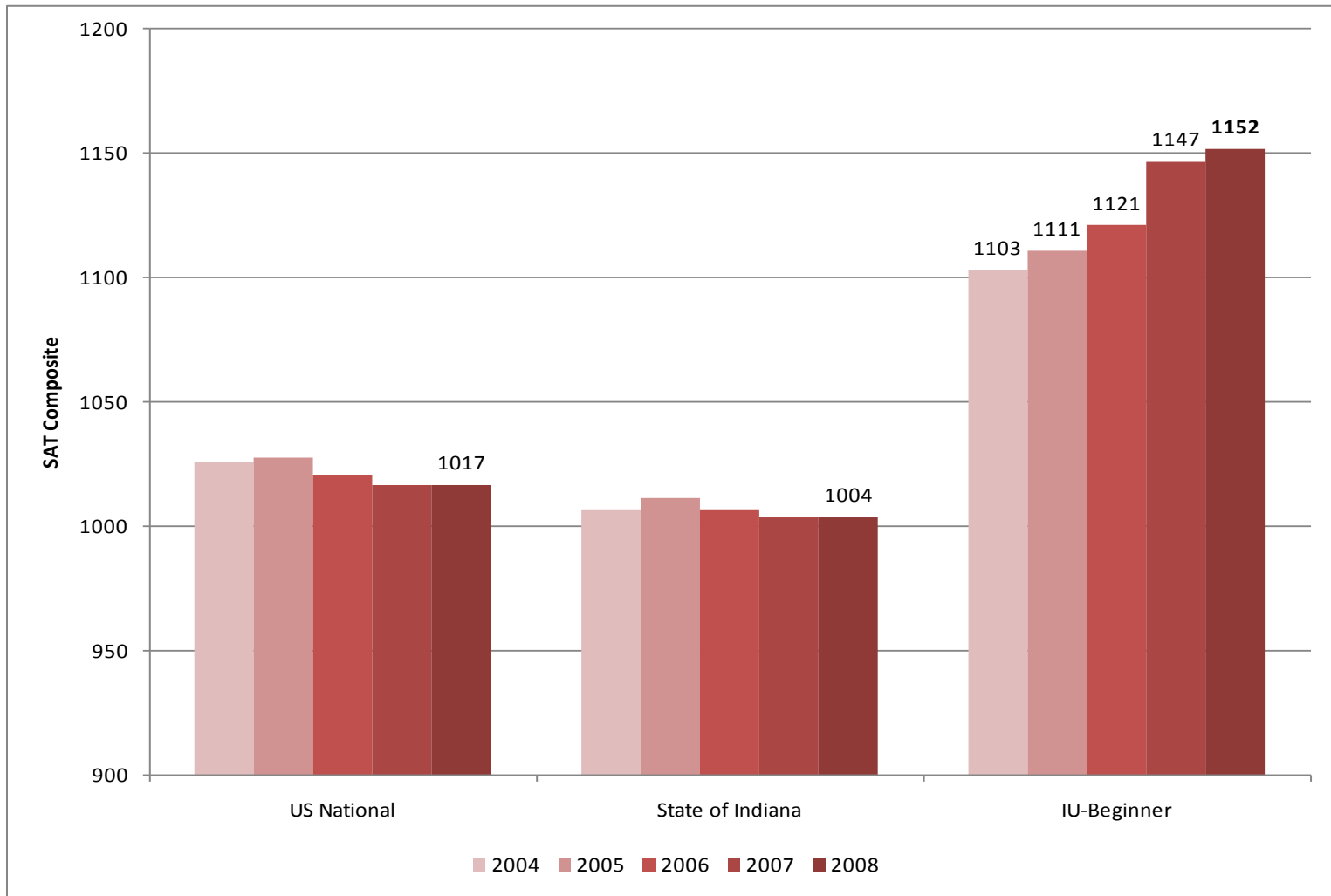


Results of New Programs

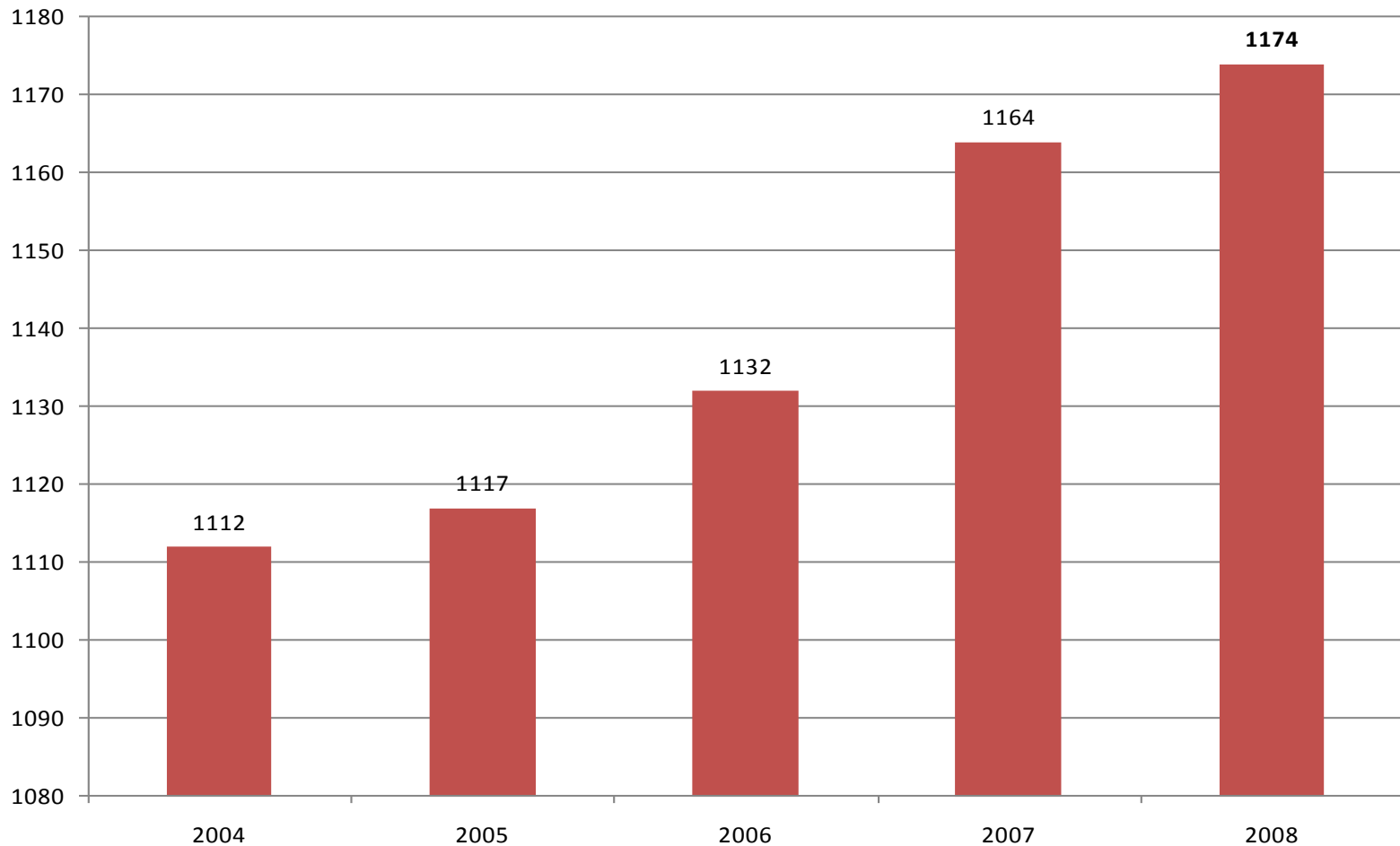
- Data mining and utilizing data are fundamental to our success.
- Specific measures are moving us in the right direction.
- We are meeting and exceeding expectations for our four recruitment goals.



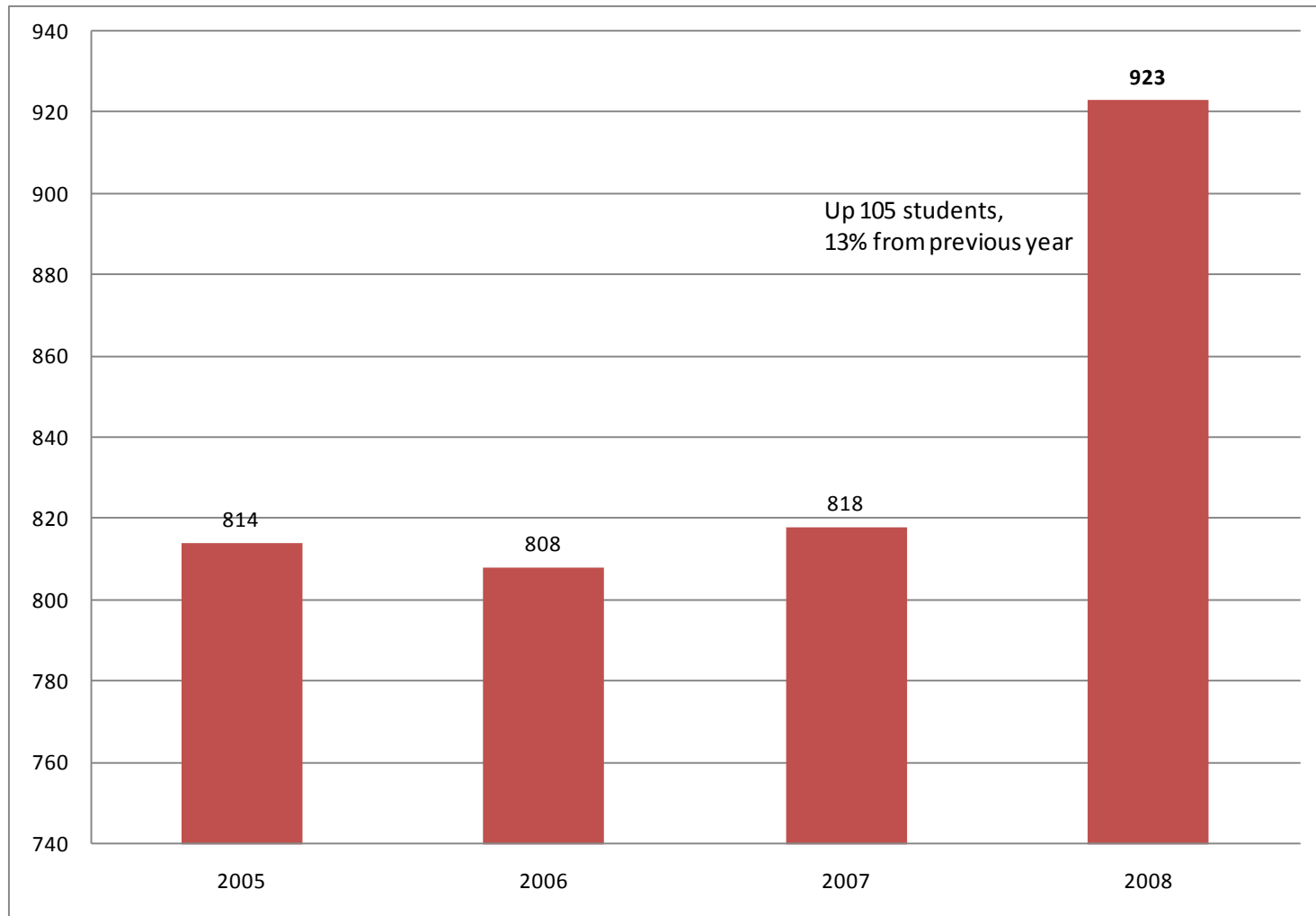
IU Bloomington Average SAT Composite Compared to US and Indiana



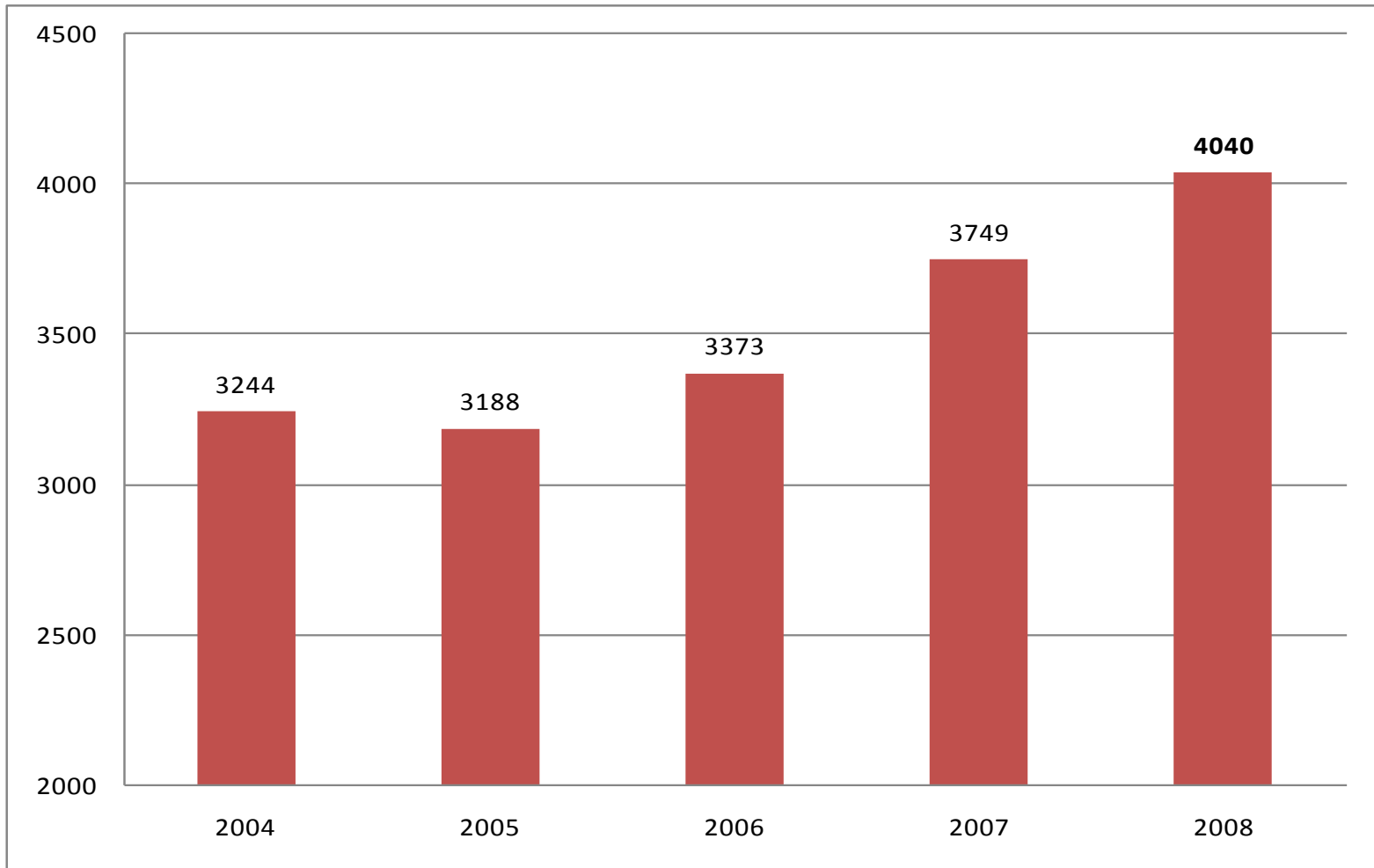
IU-Bloomington Undergraduate Beginner SAT and ACT Converted to SAT Score Combined



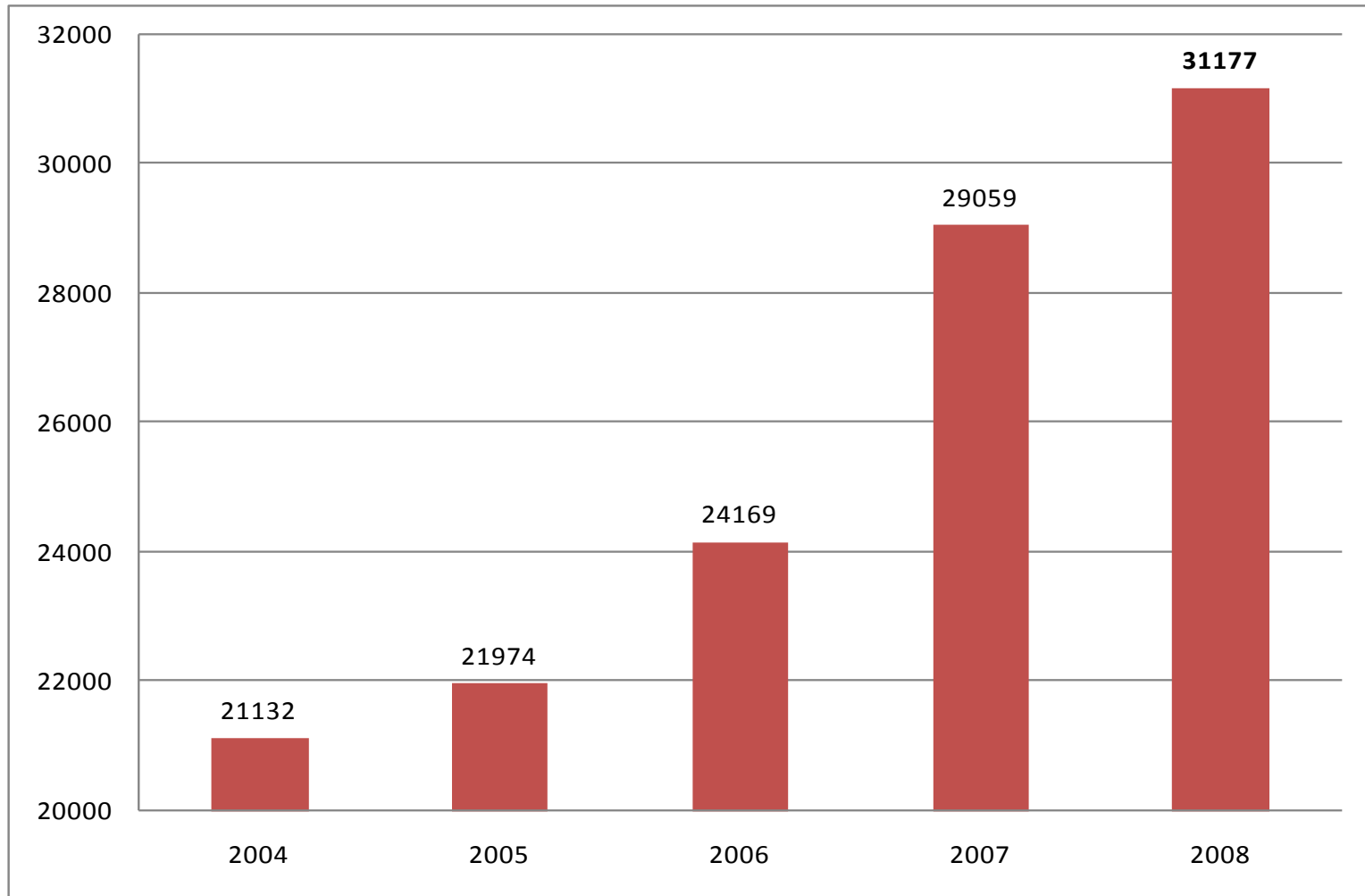
IU-Bloomington Beginner US Minority Enrollment



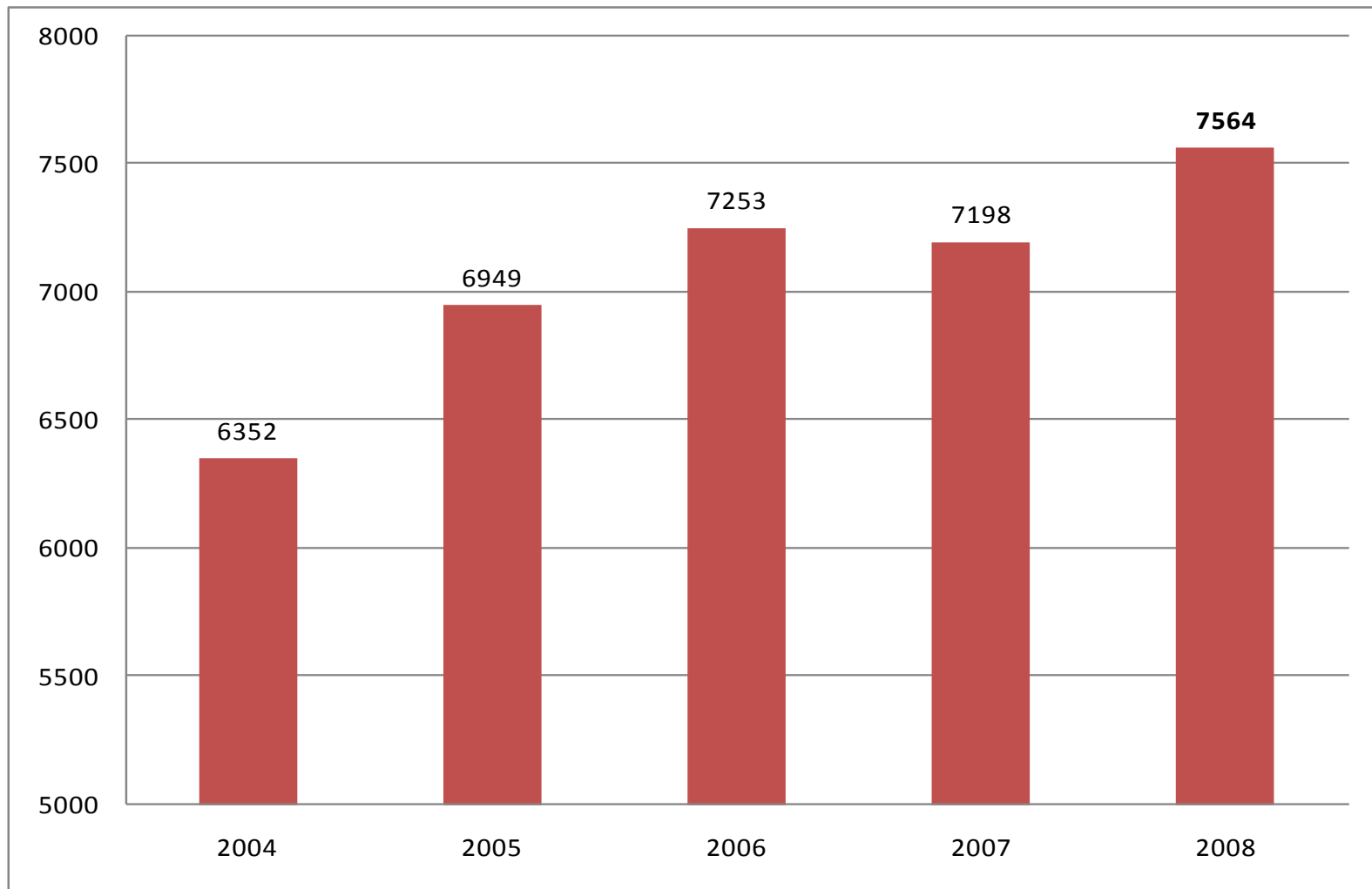
IU-Bloomington Total International Enrollment



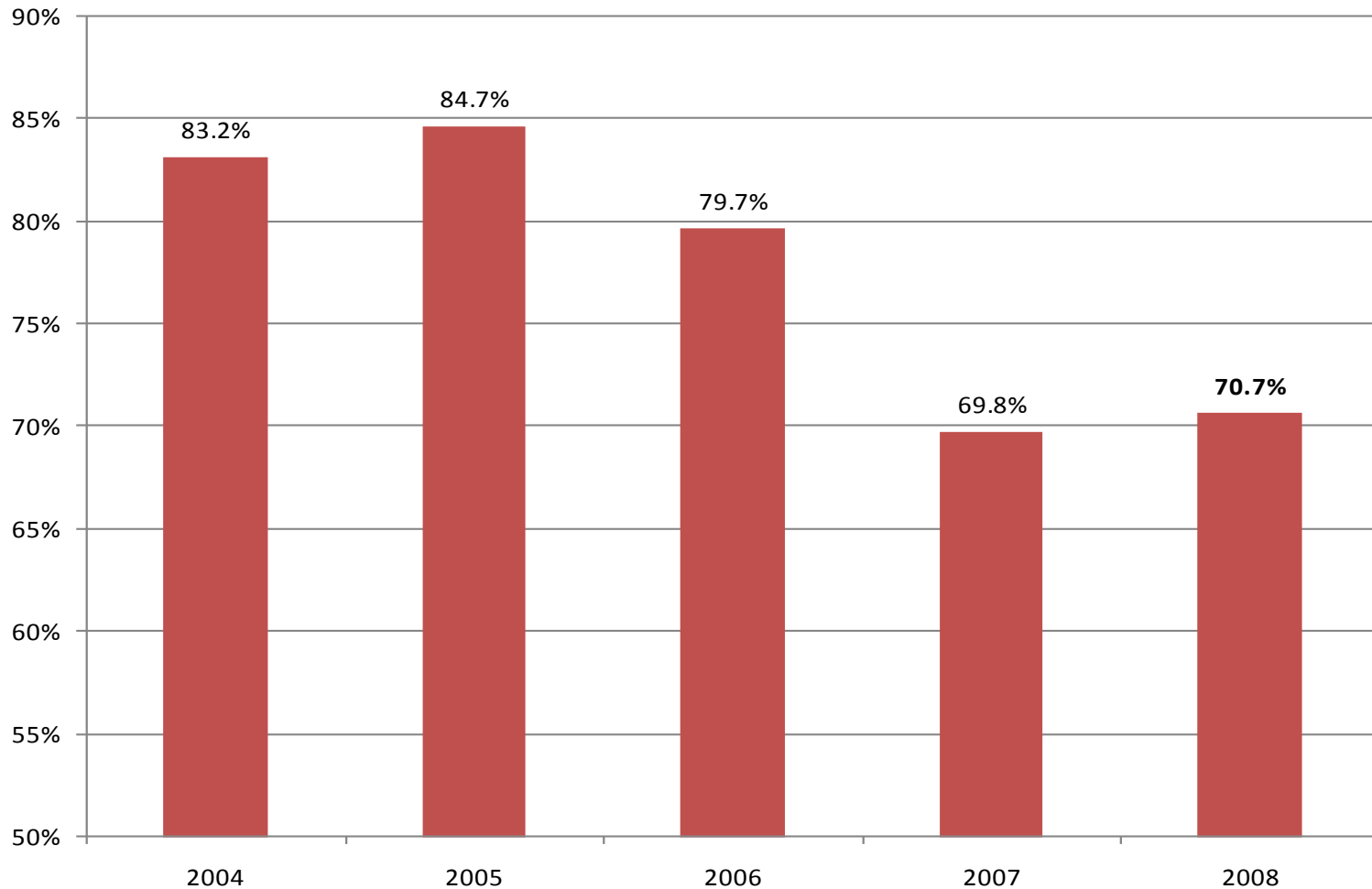
Applications to IU-Bloomington



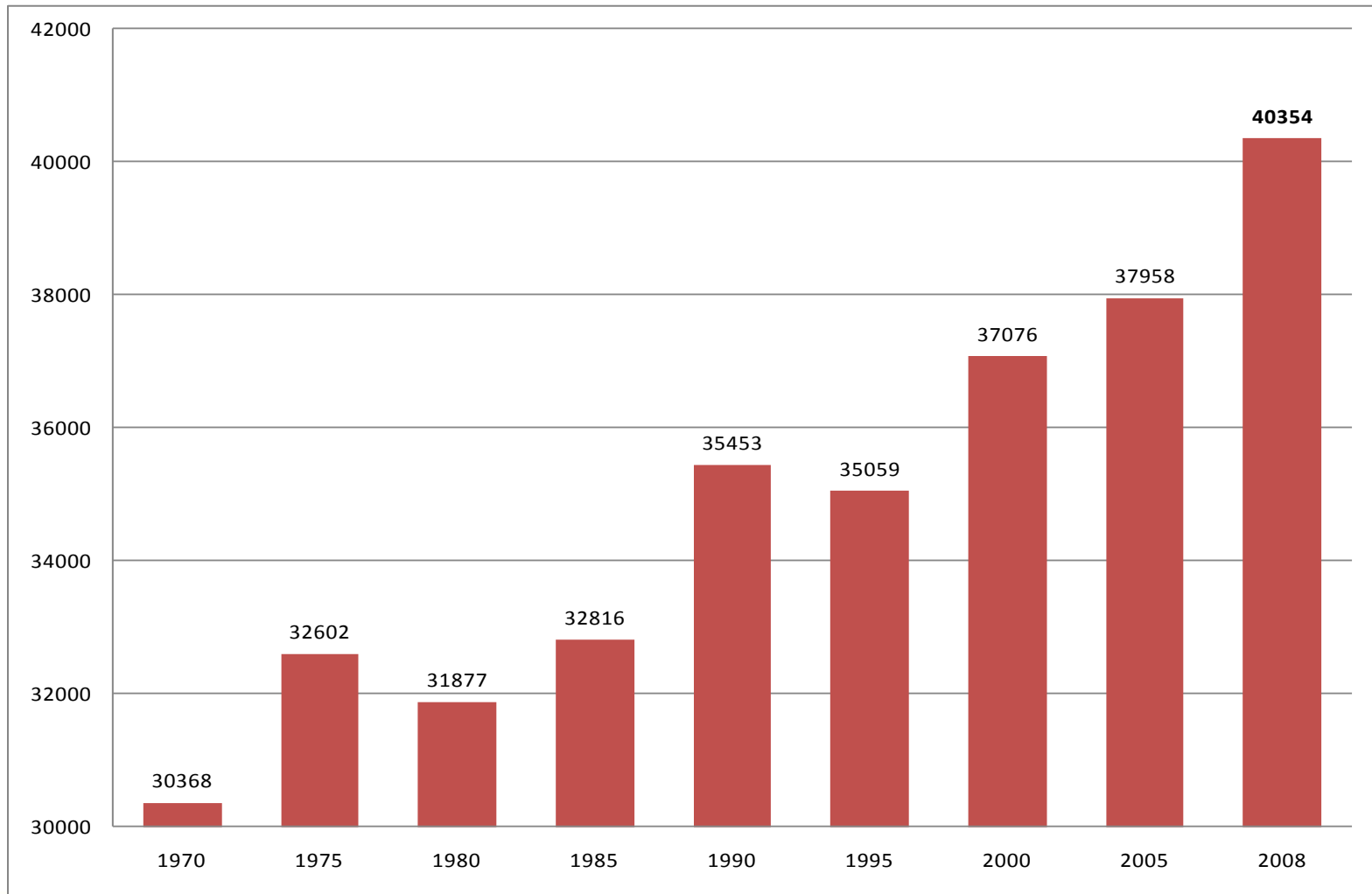
Beginner Enrollment at IU-Bloomington



Selectivity Rate at IU-Bloomington



IU-Bloomington Total Campus Enrollment



Comparing 2007 to 2008 Scholarships

		2007 Cohort	2008 Cohort	1 yr Δ, Merit Awards
		Year END, Merit Awards	Year END, Merit Awards	
Enrolled	Residents #	813	1,623	810
	\$	\$2,487,500	\$7,320,000	\$4,832,500
	Non-Residents #	1,764	1,249	(515)
	\$	\$8,251,359	\$6,155,000	(\$2,096,359)
	TOTAL #	2,577	2,872	295
	\$	\$10,738,859	\$13,475,000	\$2,736,141



Summary

- Strategic Enrollment Management requires aligning recruitment and financial aid practices with enrollment goals and providing seamless service throughout the student lifecycle.
- Data-based decision making is critical to achieving success and exceeding expectations.
- Our new direction for Enrollment Management addresses the strategic plans of Indiana University.



Goals for 2009

- Build an entering class which faculty consider to be “noticeably better.”
- Reduce the freshman class size by several hundred students.
- Become the institution of choice for the best and brightest.



“Dream no small dreams!”

Herman B Wells

Scholar Spotlight

About Dominique

**Major: French
and International Studies**

**Minor: Liberal Arts
and Management Program**

**Hometown: Indianapolis, IN
Classification: Junior**



Dominique McGee

Scholarships

Cox Research Scholarship
Mitte Honors Program

Activities and Organizations

READ – Revitalizing Education in African Development

Executive Board Member

of African Students' Association Alpha Phi Alpha “Black and Gold” Scholarship Pageant finalist

Piano teacher and student Scholarship Advisory Committee



Questions/Answers

Presenters

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