

Re-shaping your freshman class with need and merit based financial aid

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Ernest N. Morial Convention Center
New Orleans, Louisiana
Thursday, April 22, 2010
Session 350

Presentation Overview

- Strategic Enrollment Management Components
 - Philosophy and Principles
 - Recruitment Methodology
 - Financial Aid Strategy
 - Results
- Summary
- Questions and Answers

SEM Philosophy and Principles

- Student Lifecycle
- Student Centered
- Personalized Communication
- Customized Communication
- Early, Frequent and Targeted Interaction
- Seamless Service
- We don't recruit a freshmen class; instead, we recruit a group of individuals who together comprise a freshmen class.

SEM Philosophy and Principles

- Strategic Enrollment Management focuses on the service areas which impact a student's initial and continued enrollment.
- Organizations which comprise the Office of Enrollment Management include:
 - Admissions
 - Orientation Programs
 - Registrar
 - Research
 - Scholarships
 - Student Financial Assistance
 - Systems Design and Development

Recruitment Methodology:

- It is everyone's job to recruit and retain students.
 - Be coordinated, strategic and targeted.
 - Recognize the competitive landscape.
 - Develop aggressive, personalized recruitment.
 - Out-work and out-think competition.
 - “Win” mentality.
 - Teamwork.

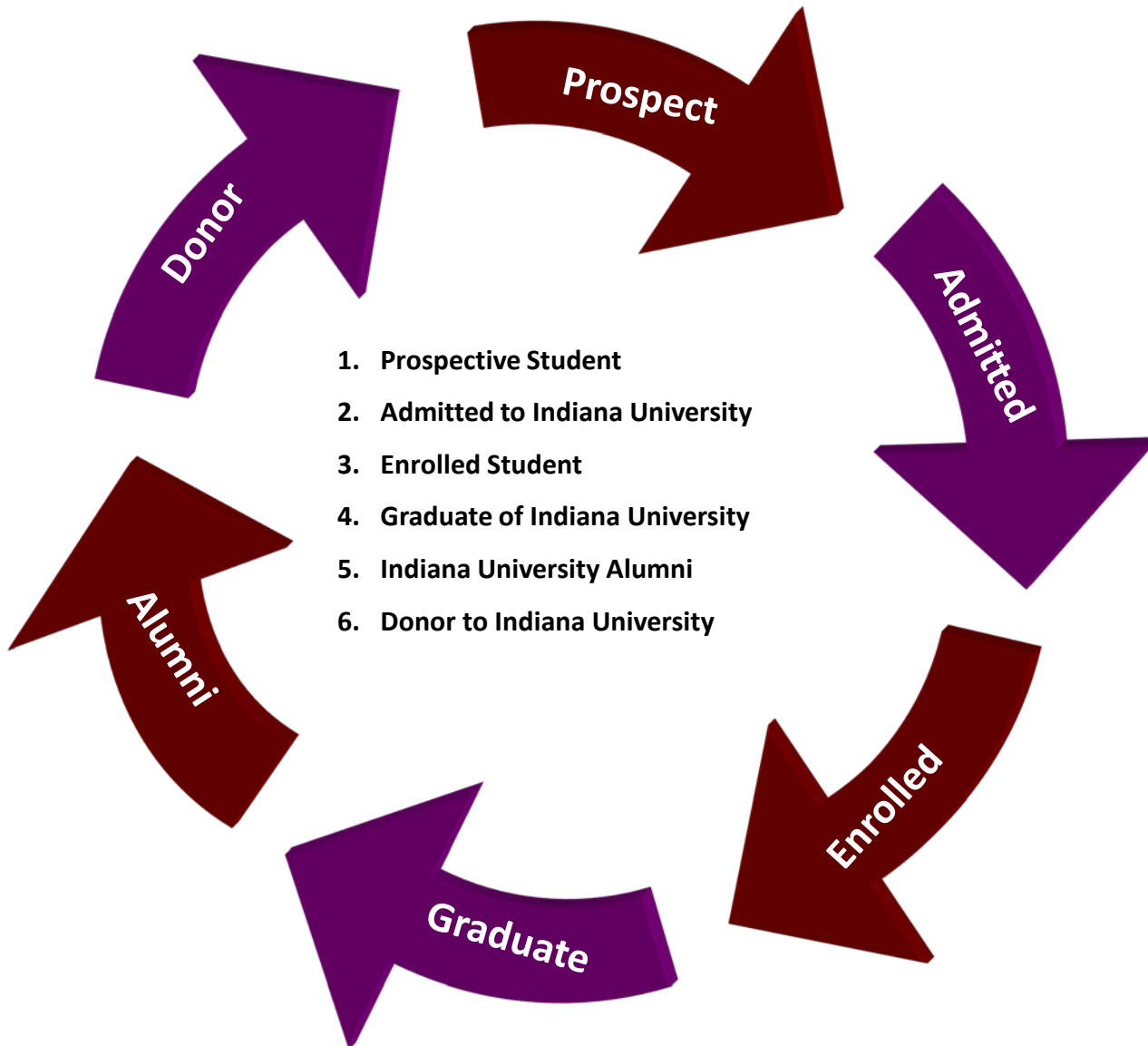
New Recruitment Initiatives

- Build the pipeline
 - Increase bought name program
 - Create buzz through program
- Earlier and more frequent communication
 - Direct mail campaigns targeting soph-senior year.
 - Direct mail pieces to populations beginning early.
 - Increase frequency, strategically.
- Customized and personalized communication
 - E-mail
 - Direct mail, correspondence from new sources.
 - “push pieces”
 - Video communication.

New Recruitment Initiatives Continued

- National publications
 - African American student guide
 - Hispanic student guide
- New marketing approaches and pieces
 - DVD
 - Personalized postcard
 - On-line chat rooms
 - Personalized videos
- Enhance web-presence
 - Re-design of admissions web-page, fluid
 - Collegeview.com presence, China presence
 - Phone Blitzes
 - Students speaking with prospective students

STUDENT LIFECYCLE



Four 2009 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**.

Financial Aid Strategy

- Need-Based Financial Aid
- Merit-Based Financial Aid
 - Must align to recruitment and enrollment goals.
 - Must be presented in an easily understood manner to students and parents.
 - Must be coordinated and applied strategically.
 - Must be widely published.
 - Requires outstanding student service.

Financial Aid Strategy

- Merit-Based Financial Aid
 - Must be based on high standards.
 - Designed to increase the quality at all levels in the “pipeline” or “funnel”.
 - Requires continual outcome assessment.
 - Key Recruitment Point:
 - Parents, students and high school contacts should have a clear understanding of merit-based parameters early in the student selection process.

Fall 2010 Admissions

- Admission standards have increased.
- Most competitive admission process in Indiana University's history.
- Application growth continued this year creating a four year increase from roughly 21,000 applications to over 36,000 received.
- Quality brings quality—this has been our emphasis over the past few years.

Fall 2010 Admissions

- Models Forecast:
 - FA 2010 class will be an extremely academically talented entering class.
 - Mean SAT will hover around 1200, compared to 1110 just six years ago.
 - 25th & 75th percentiles will continue at record levels.
 - Diversity will be strong.
 - Particularly among Hispanics.
 - International presence will be strong.
 - China, Japan, S. Korea and Taiwan
 - Largest growth, China

OEM Financial Aid Leadership

- New Programs
- New Marketing/Promotion/Publication
- Increased and expanded outreach to families and high schools
- New team members
- New leadership

New Need Based Financial Aid Programs

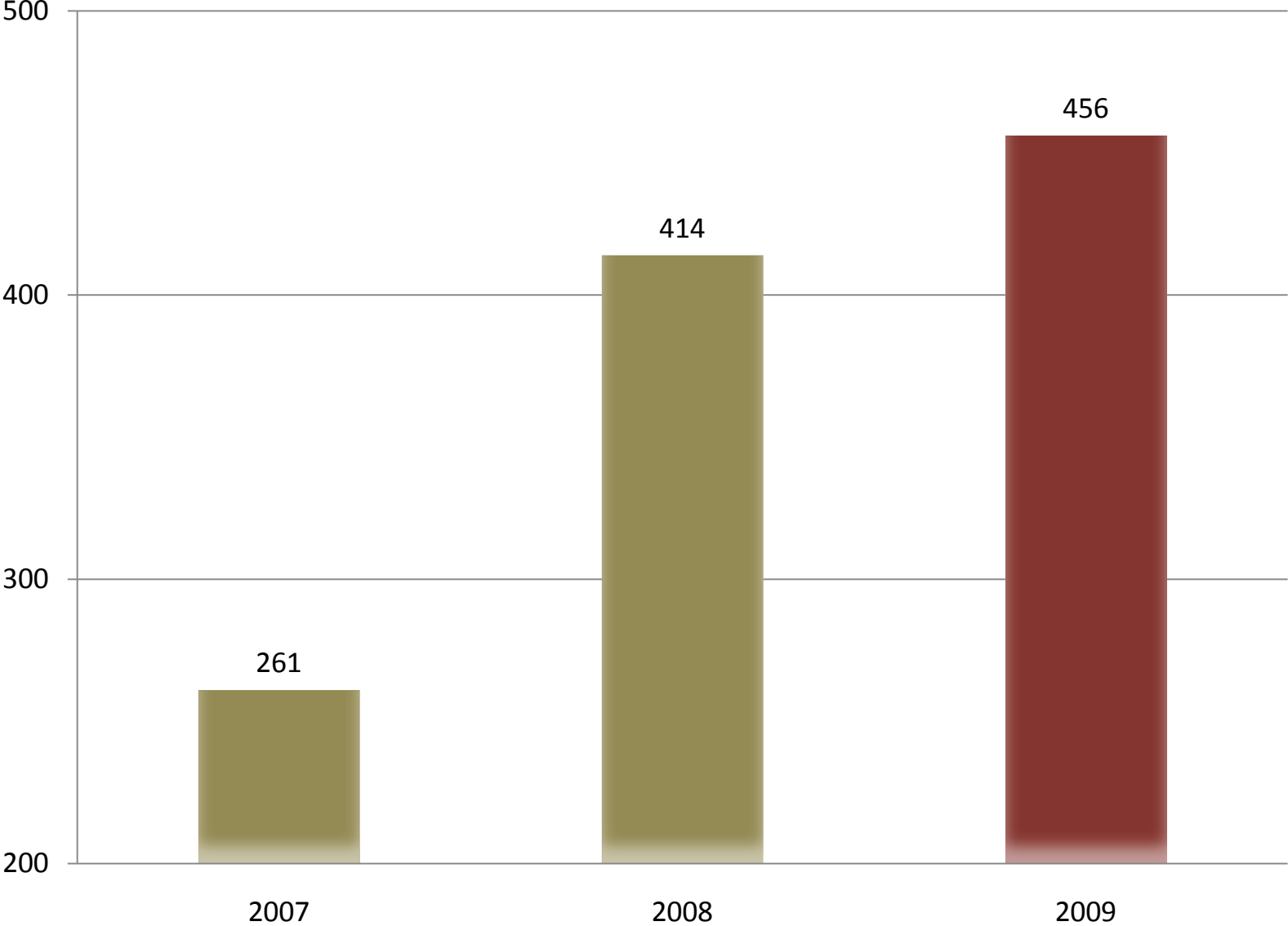
- 21st Century Scholar Covenant
- Pell Promise
 - Both designed for Indiana Residents

Financial Aid: New Initiative

21st Century Scholar Covenant

- Affordability Task Force
 - Need-based program.
 - Addresses need of the lowest income Indiana families.
 - Builds on an existing State of Indiana program.
 - Provides full cost of attendance to participants.
 - Begins the recruitment process at the junior high school level.
 - Delivers a message of “hope” to a low income population.
 - Builds on a mentoring structure for success already in place.
 - Provides funding for a diverse group of students.

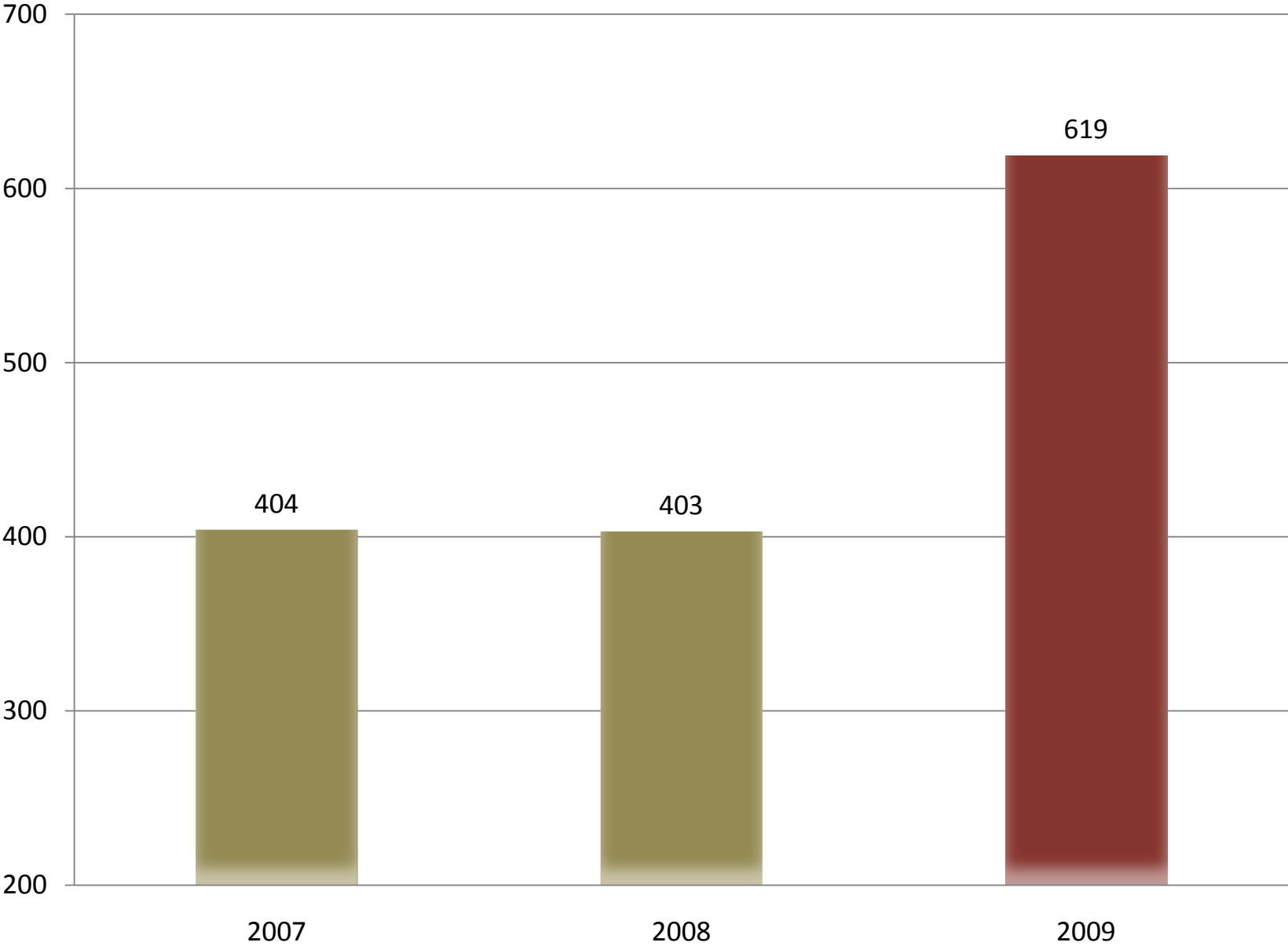
21st CENTURY SCHOLARS COVENANT BY BEGINNING COHORTS



Financial Aid New Initiative: Pell Promise

- Need-based program.
 - Addresses need of lower- and middle-income Indiana families.
 - Builds on an existing federal program.
 - Provides cost of tuition and fees.
 - Provides funding for a diverse group of students.
 - Designed for Indiana Resident students.
 - Program provides aid to students with financial aid, while also providing a merit component.

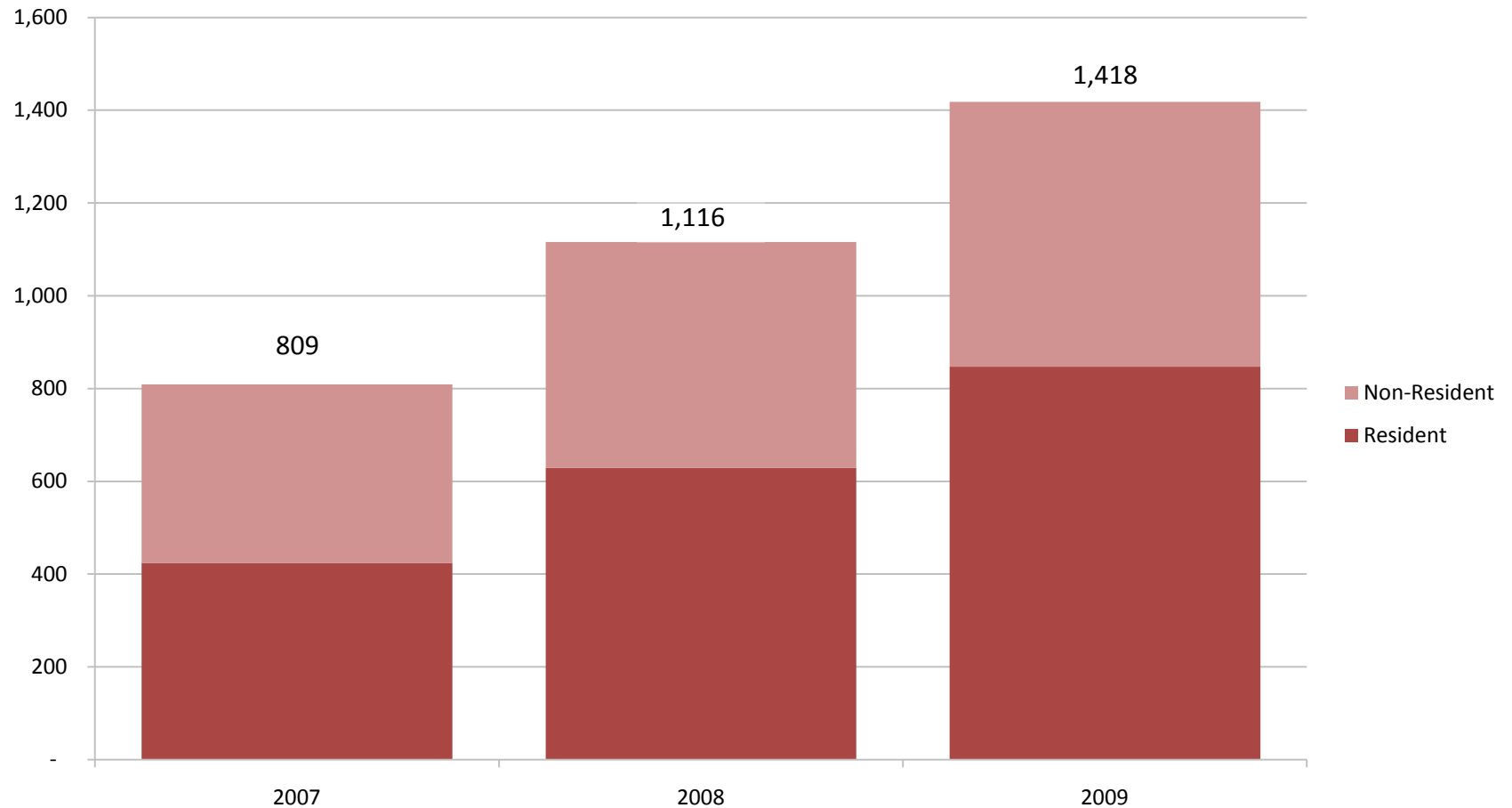
PELL PROMISE RECIPIENTS



Scholarships and Merit Based Aid

- Creation of a new Office of Scholarships.
- Director of Scholarships position created, and filled. Additional staffing has taken place.
- New scholarship criteria identified:
 - IU Excellence
 - IU Distinction
 - IU Prestige
 - IU Recognition

OEM Automatic Merit Awards (Number) to High Profile Beginners by Cohort and Residency



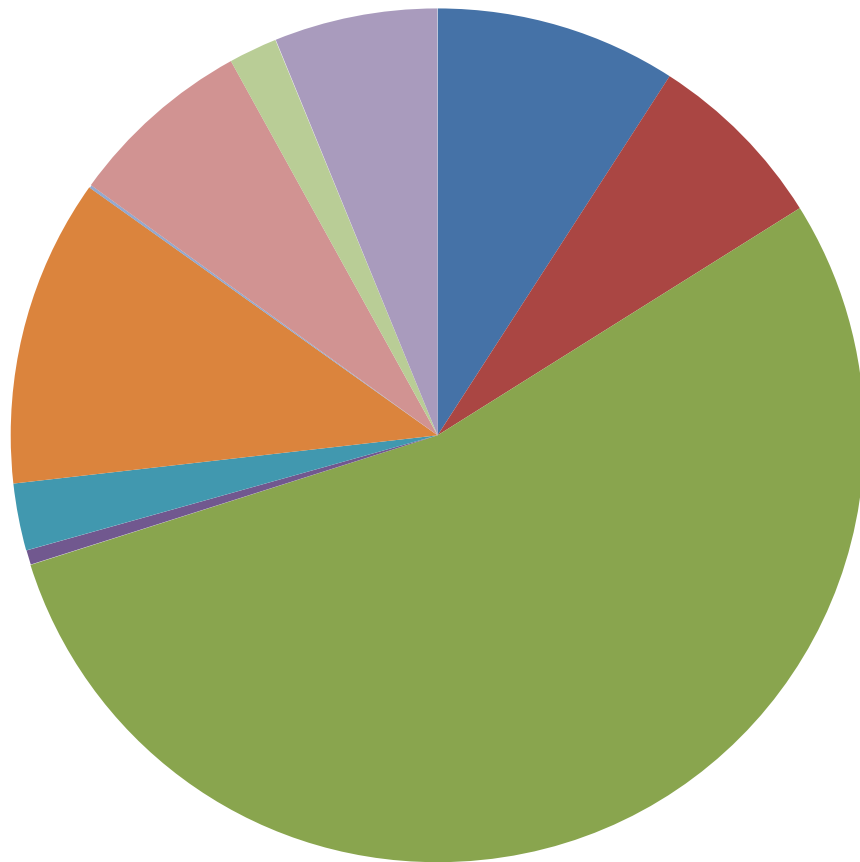
Aligning Financial Aid Strategy with New Enrollment Goals

	Need	Merit
21 st Century Scholars Covenant	X	
Pell Promise	X	
Hudson Holland Scholars Program		X
IU Excellence Award		X
Research Scholars		X

Packaging Information

- 24,434 students with a FAFSA on file for 2009-2010 academic year
 - 20,095 Undergrads
 - 5,922 freshmen
 - 5,184 sophomores
 - 4,265 juniors
 - 4,724 seniors
 - 4,339 Graduate students

Types of Aid



- Departmental Scholarships
- Federal Grants
- Federal Loans
- Federal Work-Study
- IU Grants
- OEM Scholarships
- Other IU Scholarships
- Private Loans
- Private Scholarships
- State Awards

Financial Aid Perspective

- \$388,819,251- Aid that IU Bloomington students and their parents are receiving so far in the 2009-2010 academic year
- Roughly equal to the GDP of the African nation of Equatorial Guinea
- 3 times the amount of the current NFL salary cap of \$128 million per team

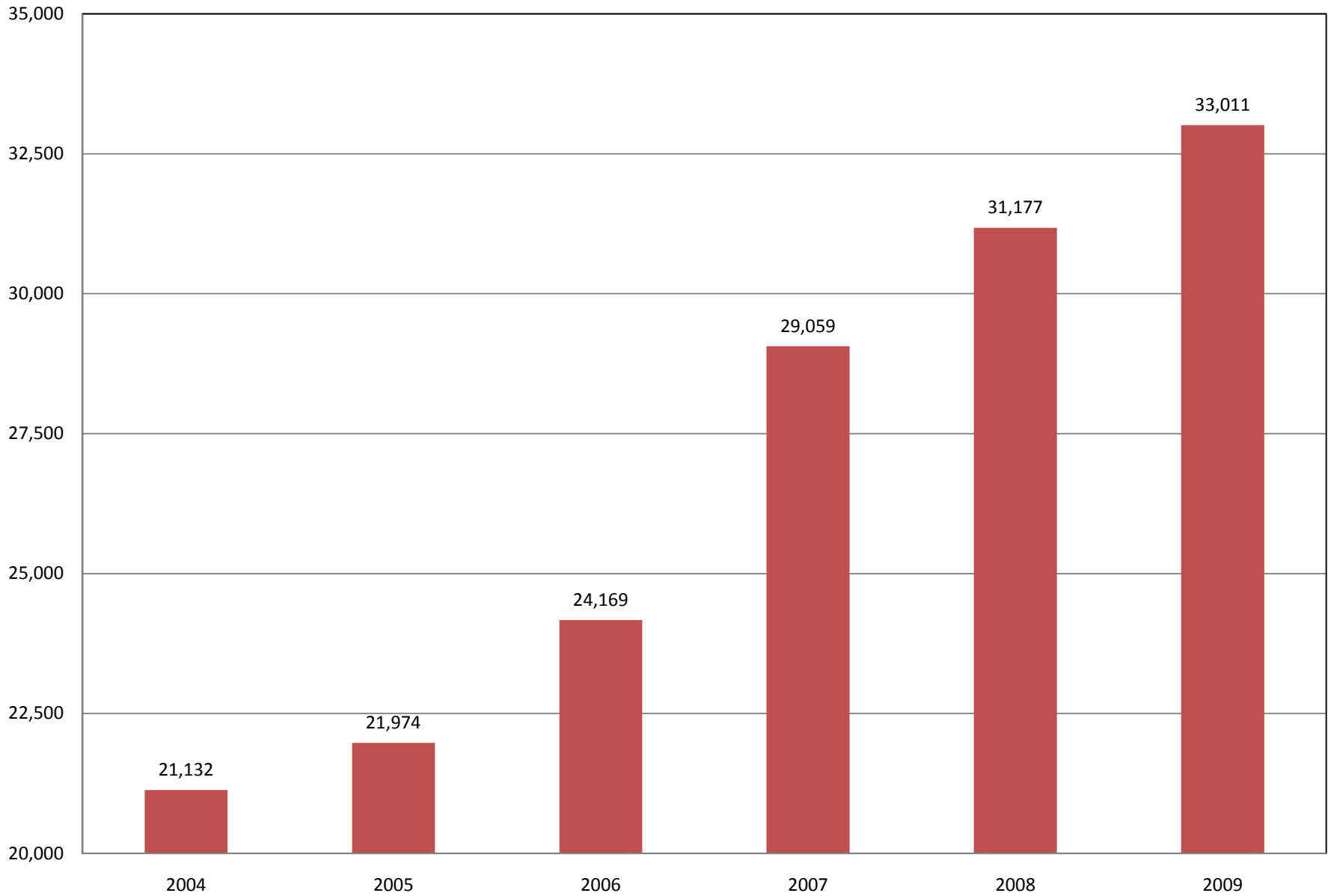
Indiana University

Strategic Enrollment Management

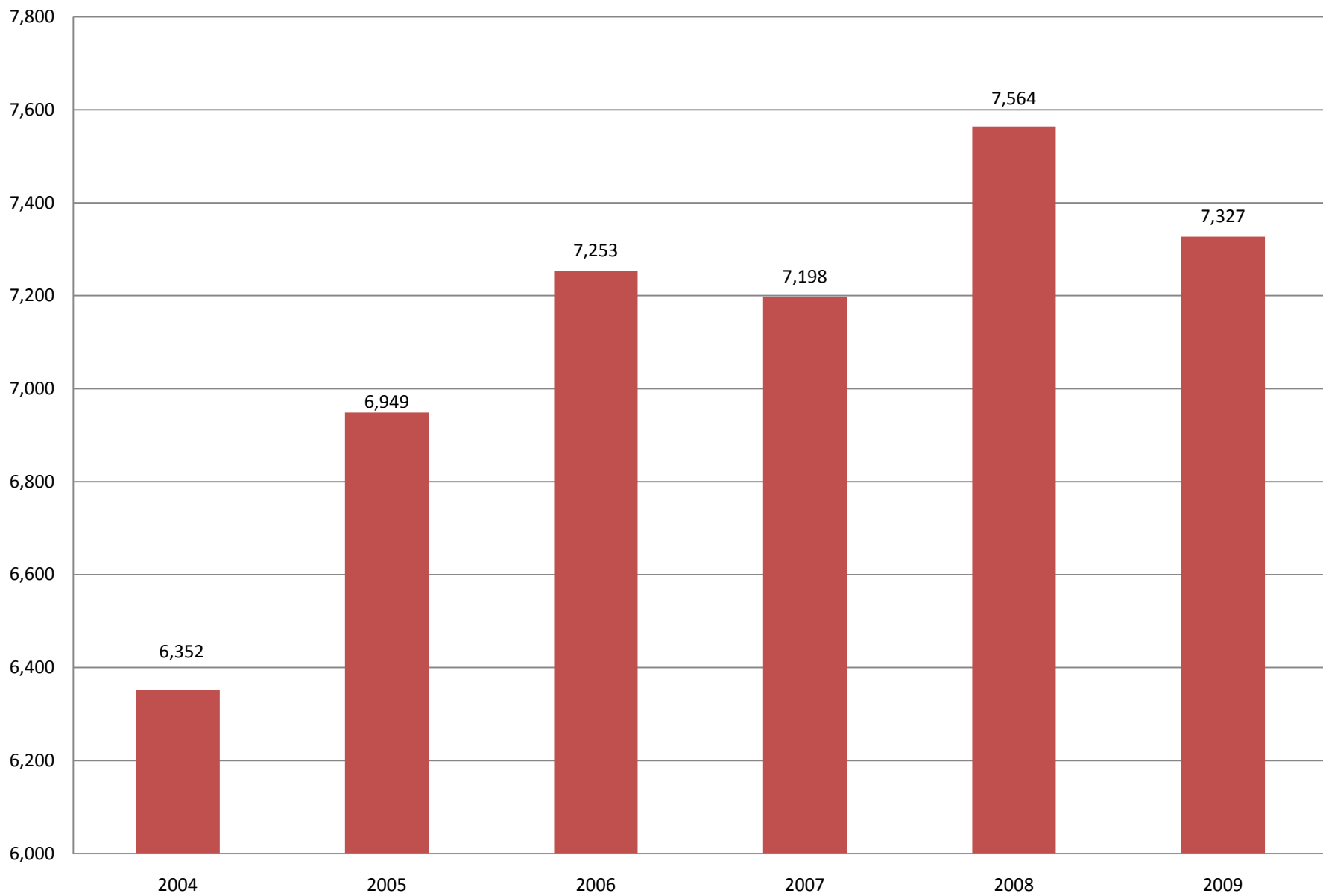
Results

- The quality of the entering class, as measured by HS GPA and SAT/ACT scores have increased to record levels.
- Diversity as measured by ethnicity and SES have reached record levels, including first generation college students.
- International enrollment as measured by country of origin has increased to record levels.
- Indiana University has remained affordable for Indiana residents.
- Freshmen to sophomore retention now hovers around 90%.

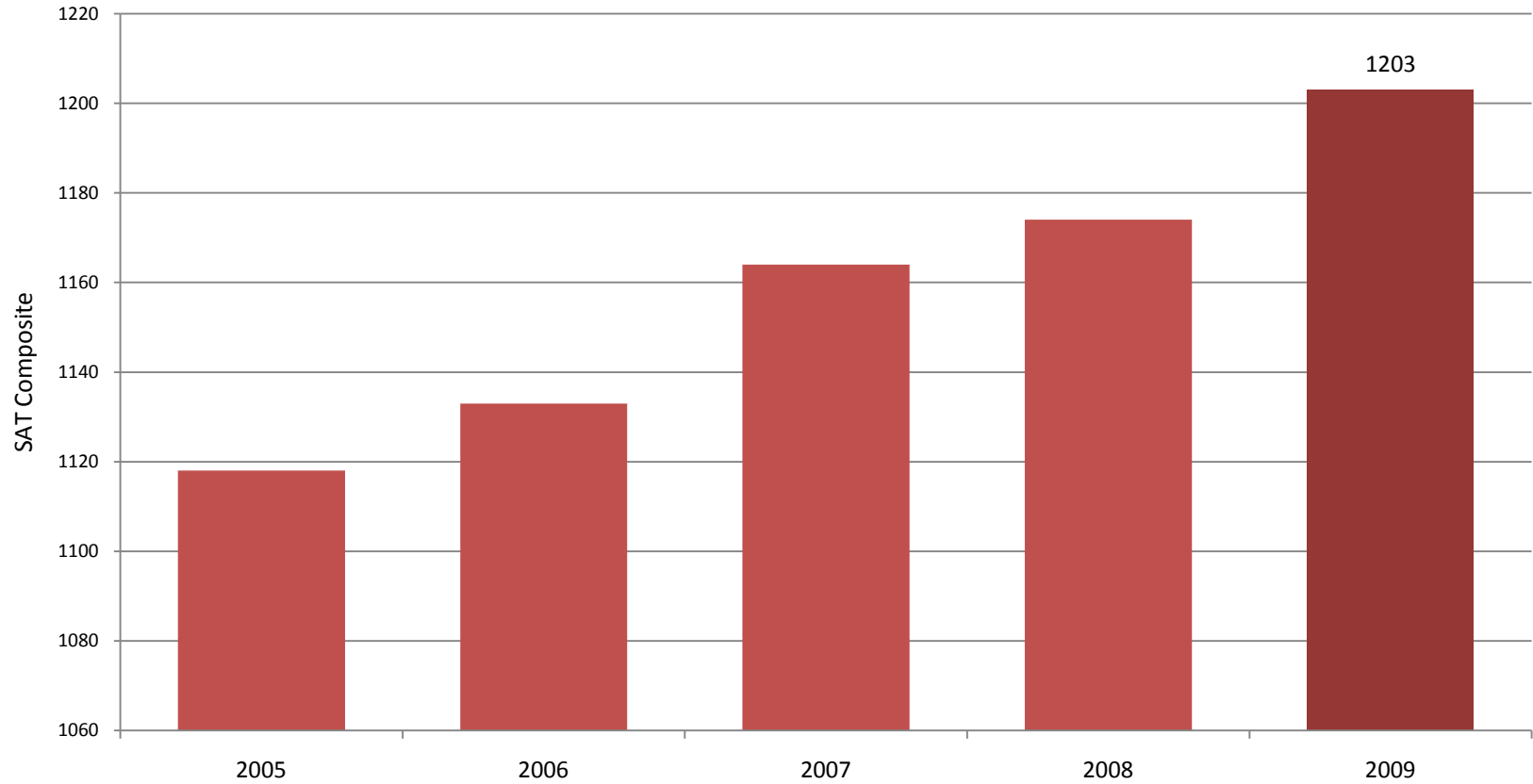
Applications to IU-Bloomington



Undergraduate Beginner

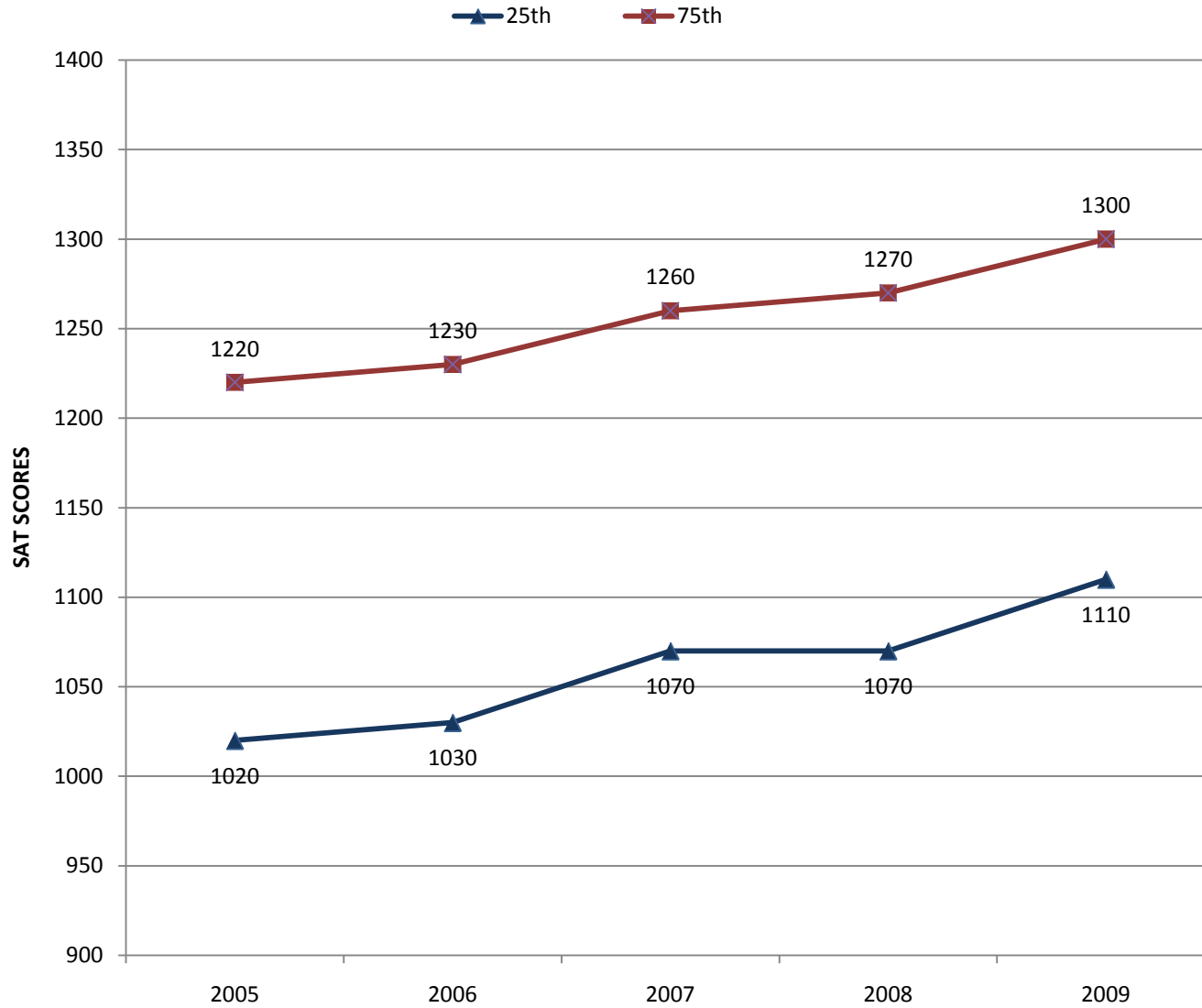


IU - Bloomington Average Composite SAT (includes converted ACT Composite)



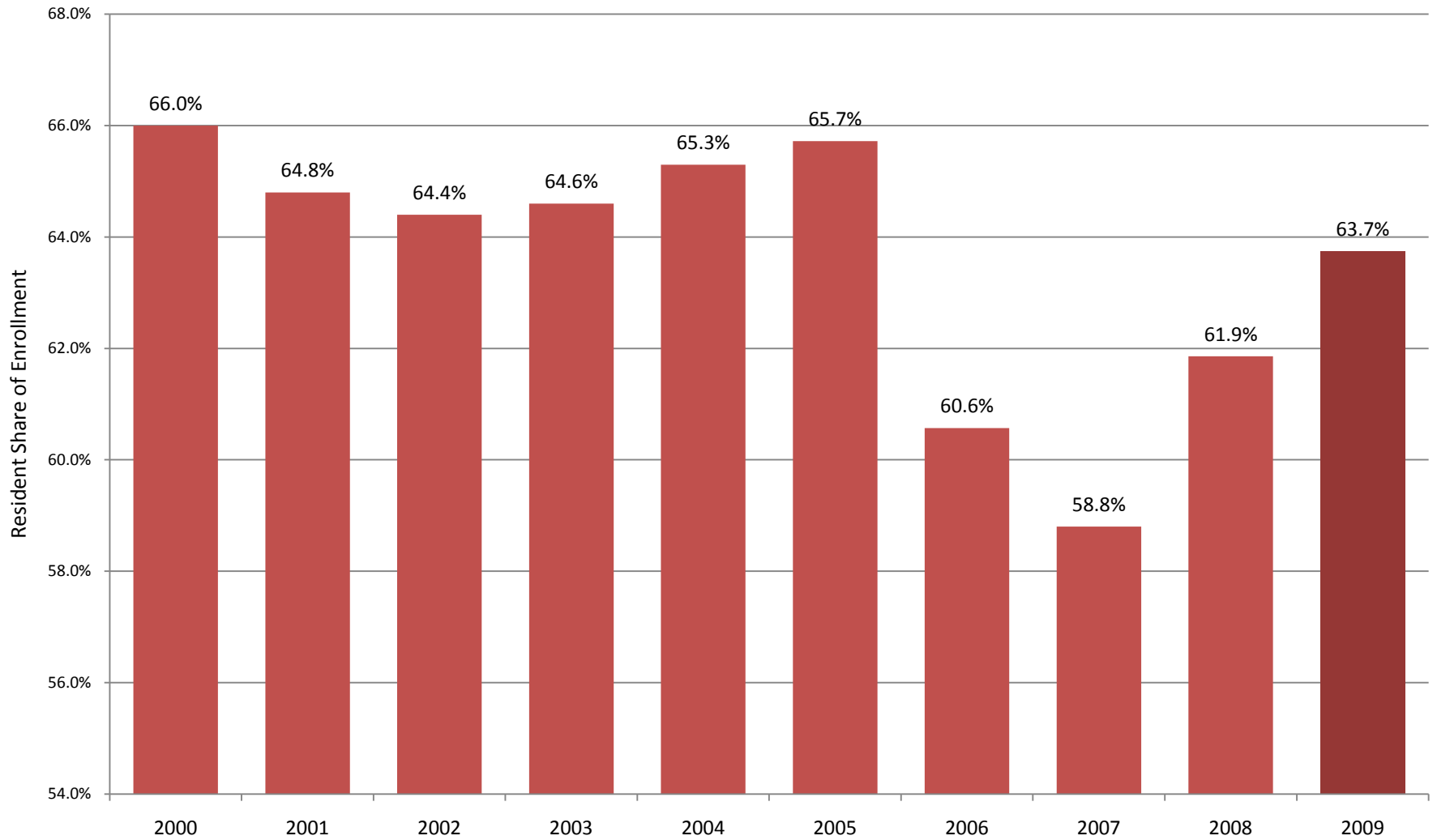
Office of the Registrar
IU - Bloomington
Date - 9/6/09

SAT (with converted ACT) 25th and 75th Percentiles



IU - Bloomington

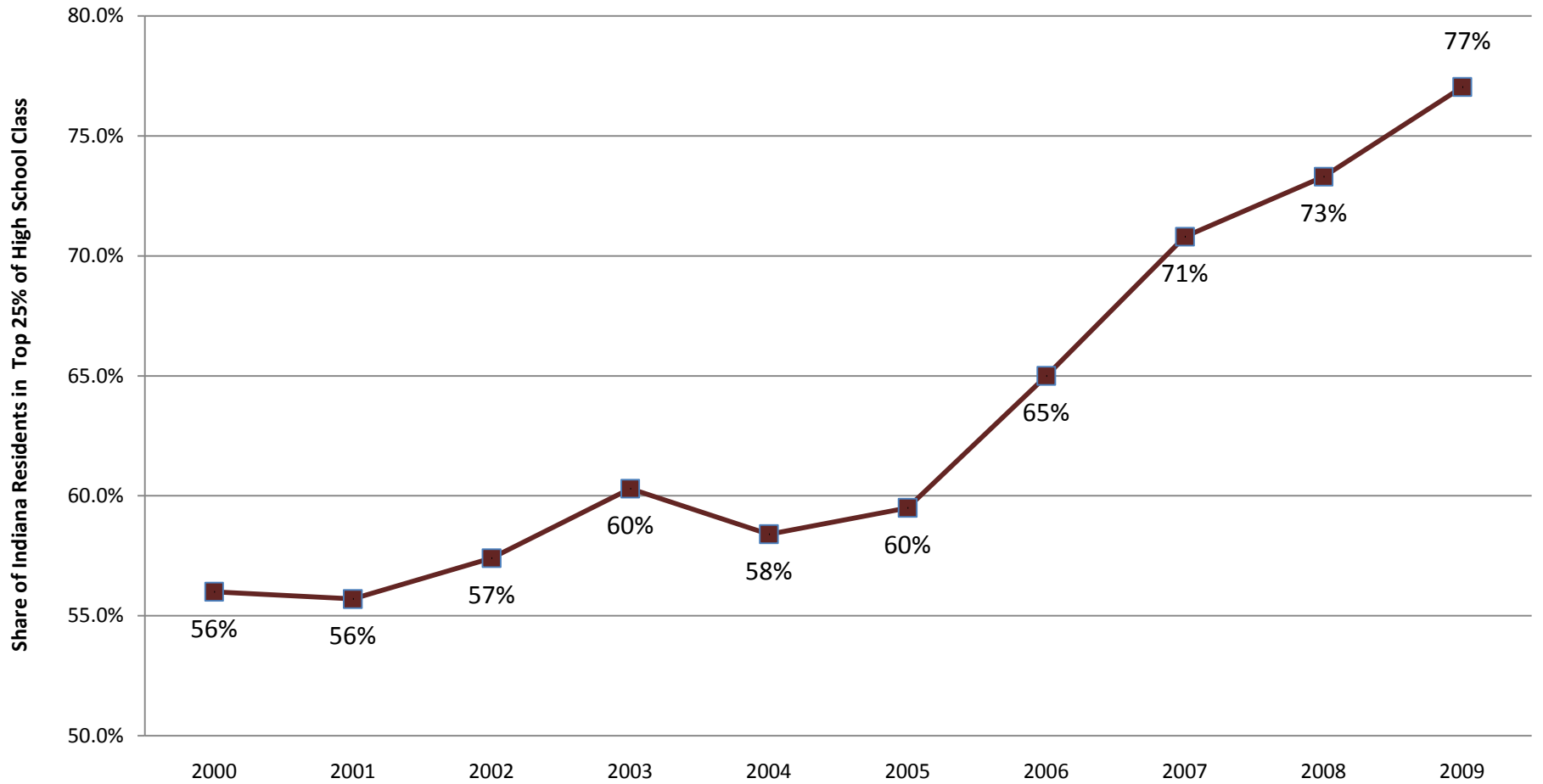
Beginner Undergraduate - Resident Share



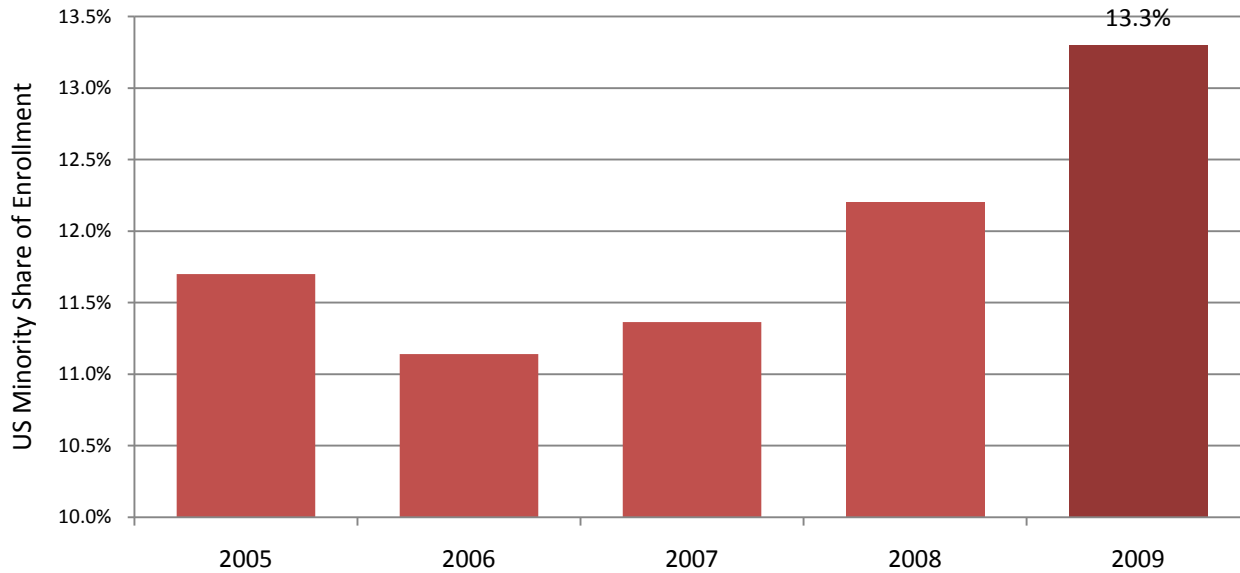
Indiana University - Bloomington

IU- Resident Beginner

Share in Top 25% of High School Class



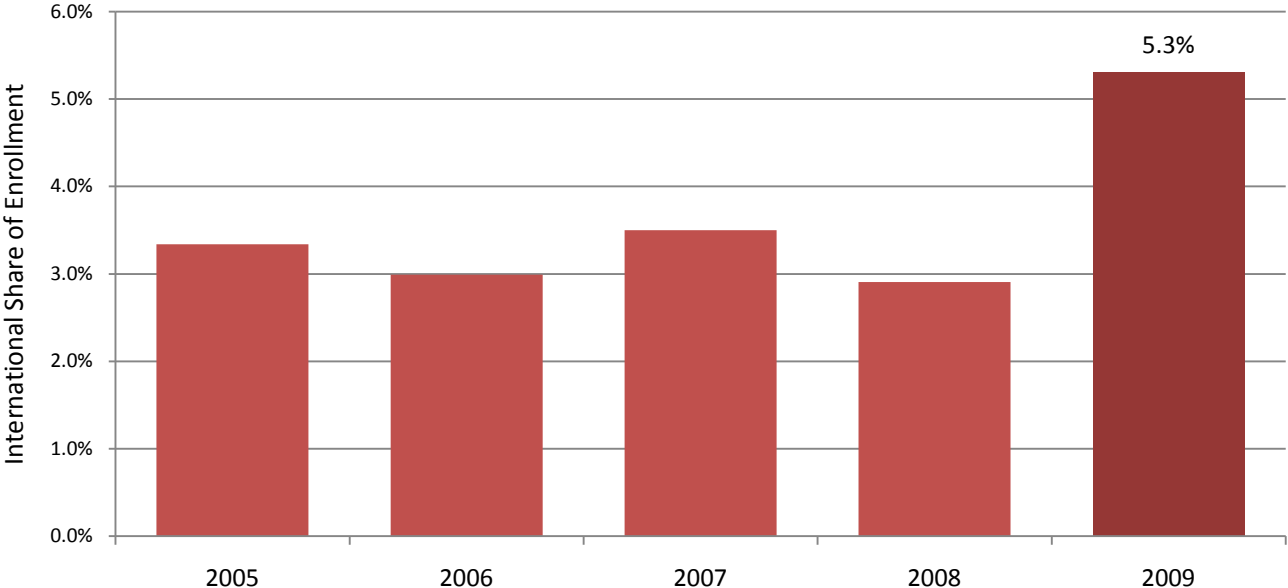
IU - Bloomington Beginner Undergraduate - US Minority Share



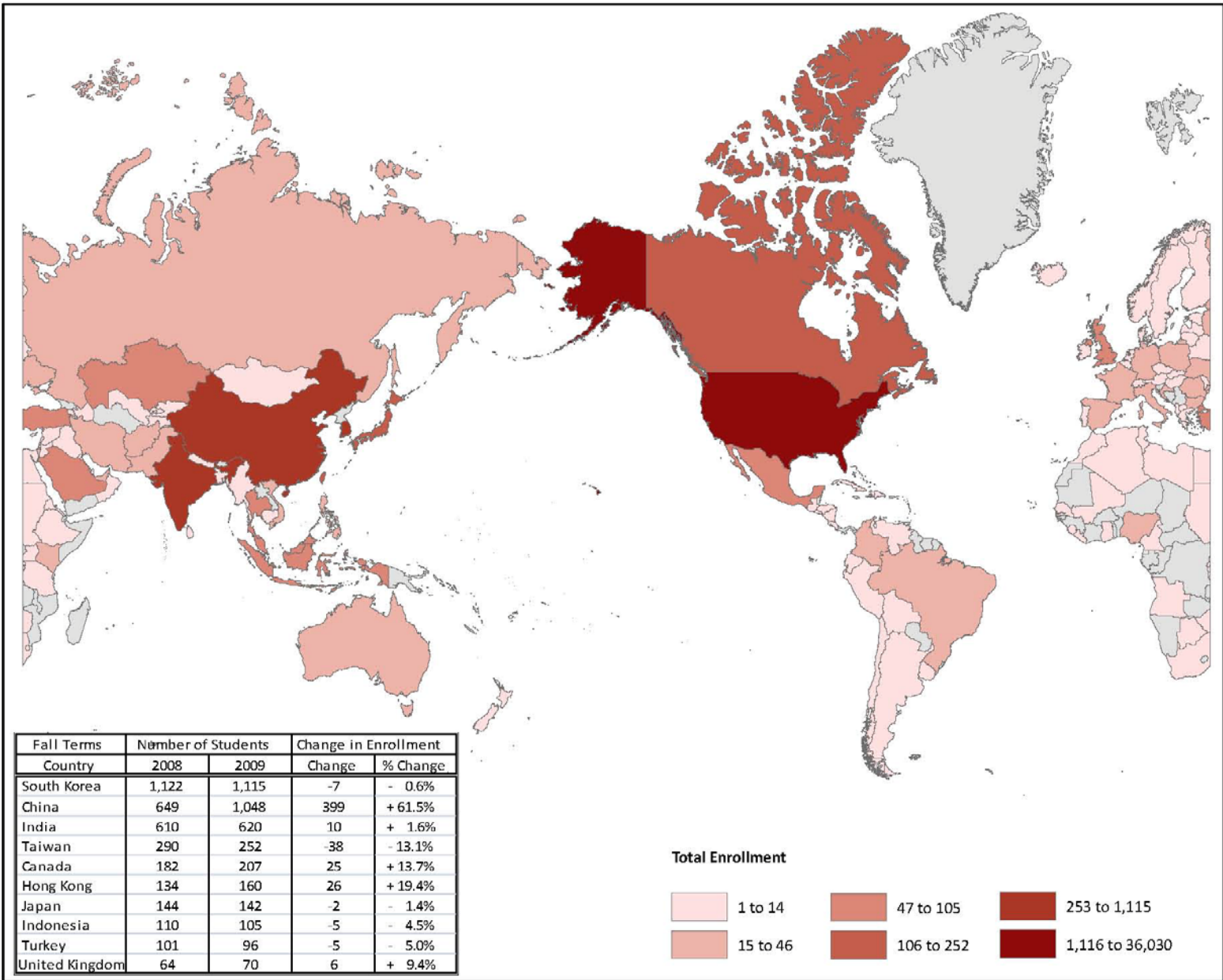
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IU - Bloomington

Beginner Undergraduate - International Share



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IU - Bloomington
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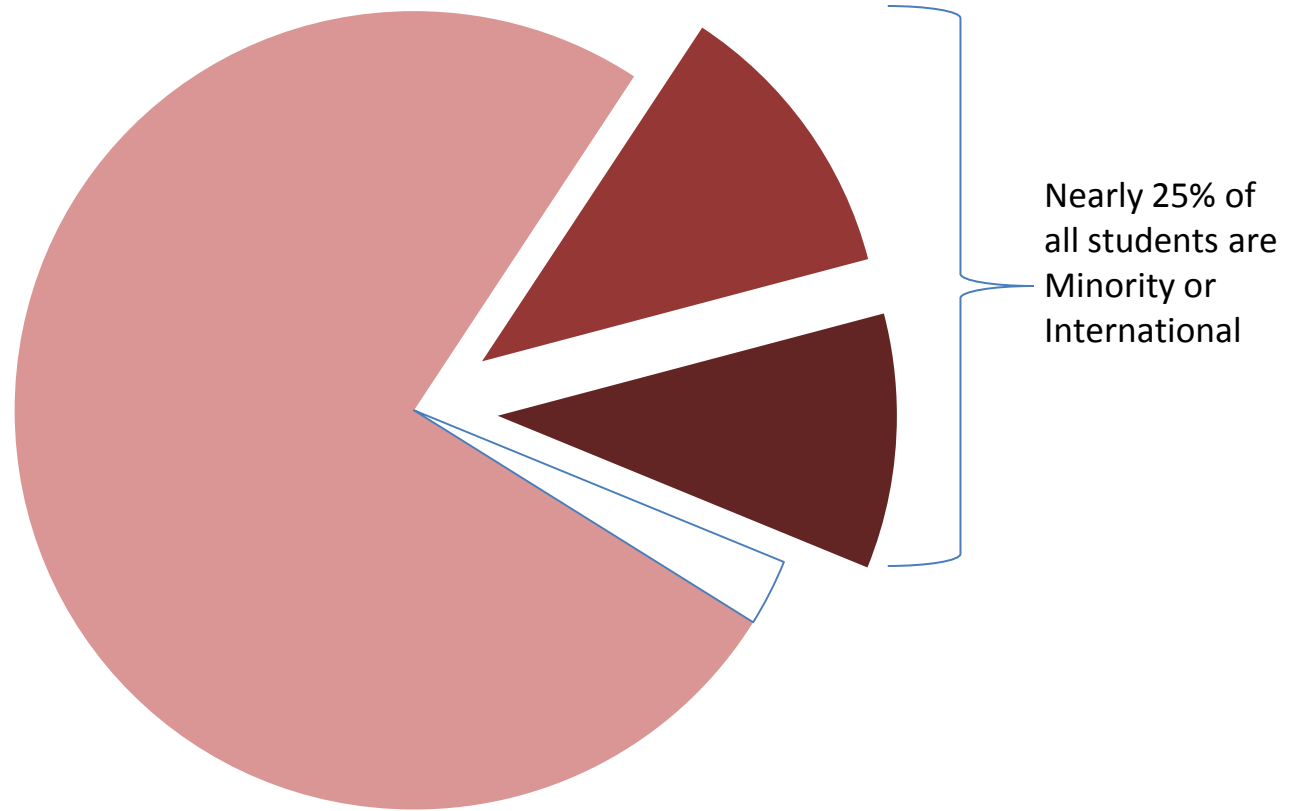
International Beginner

- Fall 2009 international beginners the largest in IU history
 - Project started 3 years ago
 - New recruitment brochures targeting international students
 - Travel by OIA, OVPIA, President, Alumni Association
- Currently rank 15th nationwide in international enrollment. Anticipate moving into the top ten in this category next year.

DIVERSITY

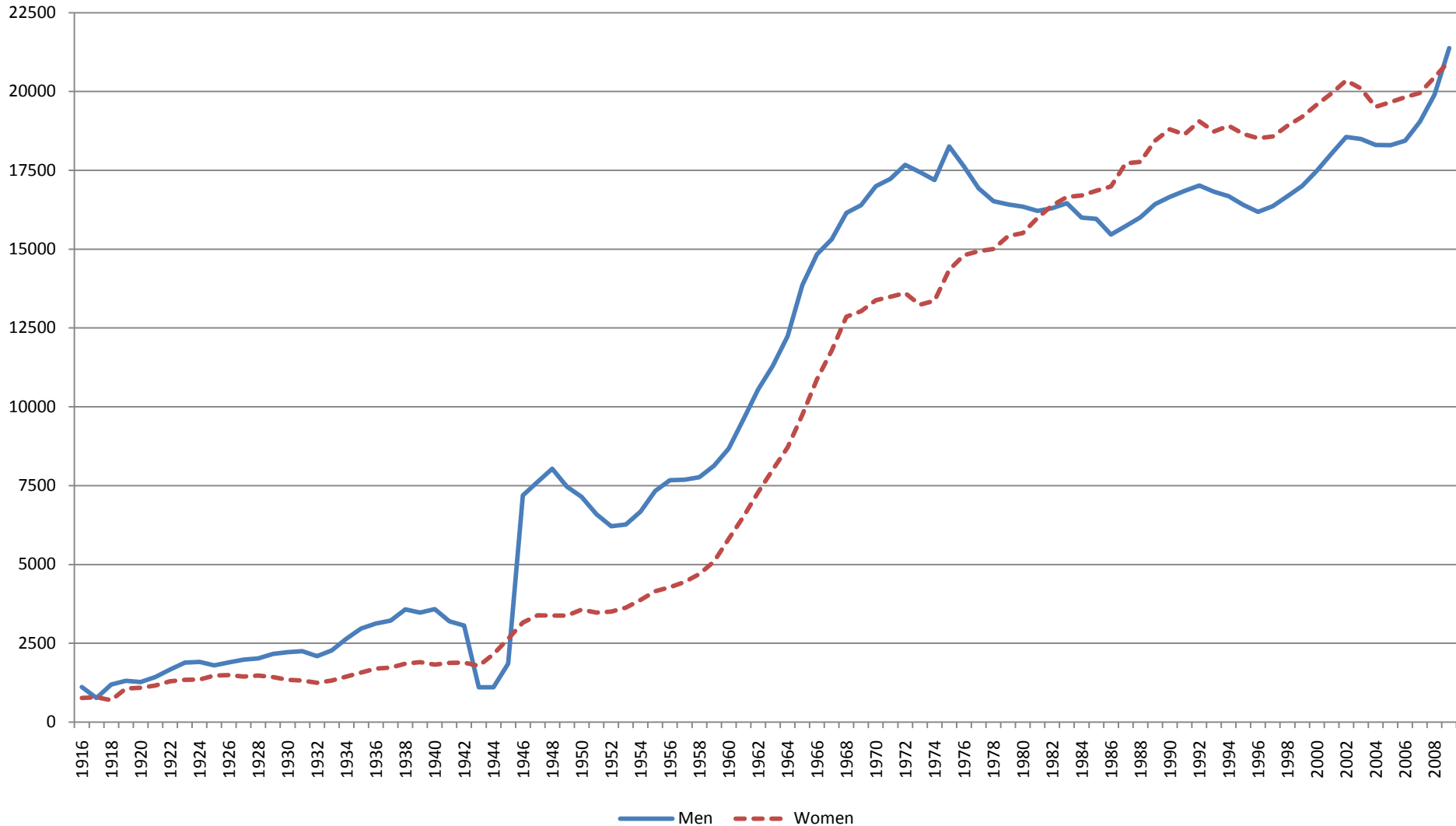
IU Total Enrollment

■ White ■ US Minority ■ International ■ Unknown

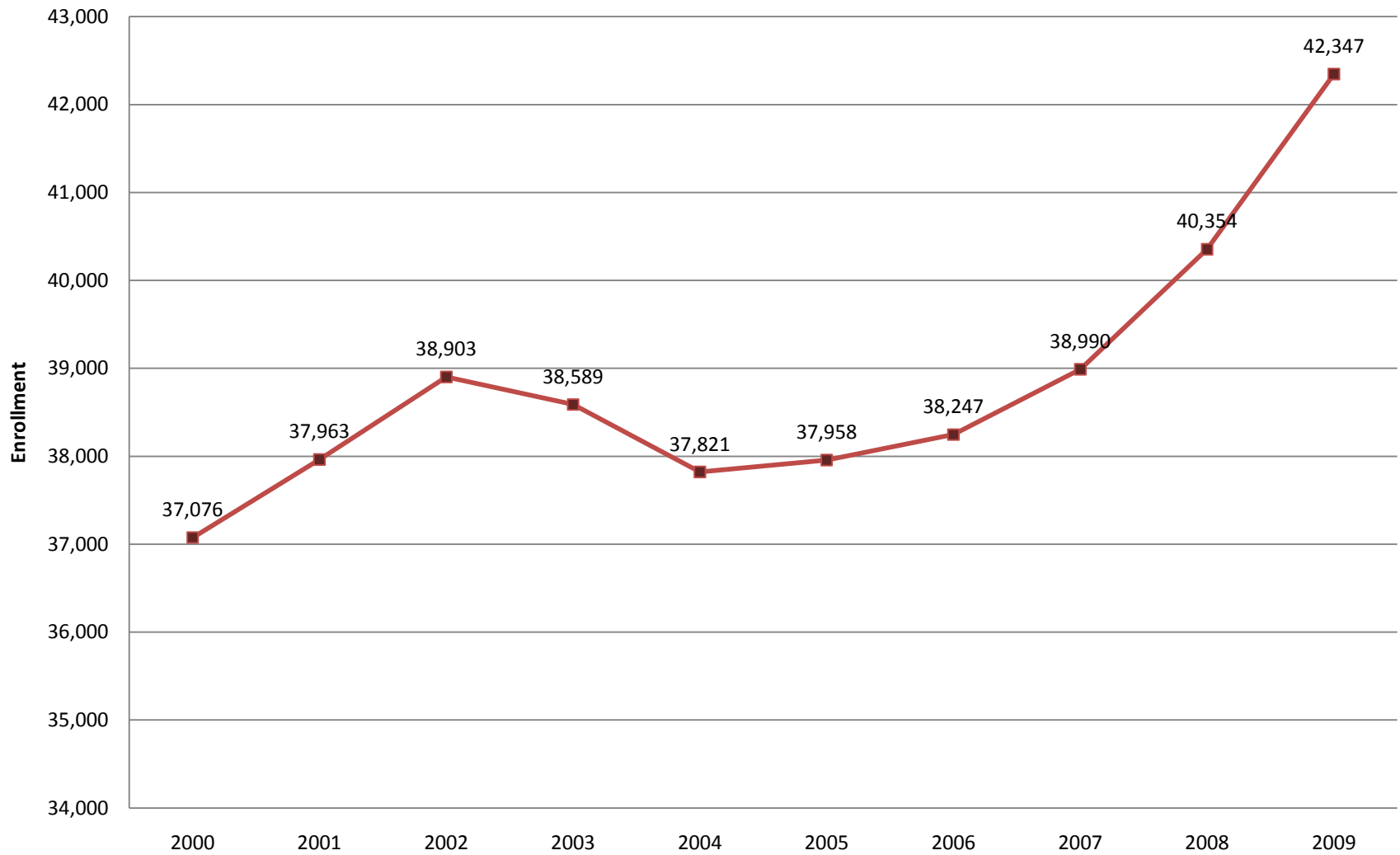


Diversity – Gender

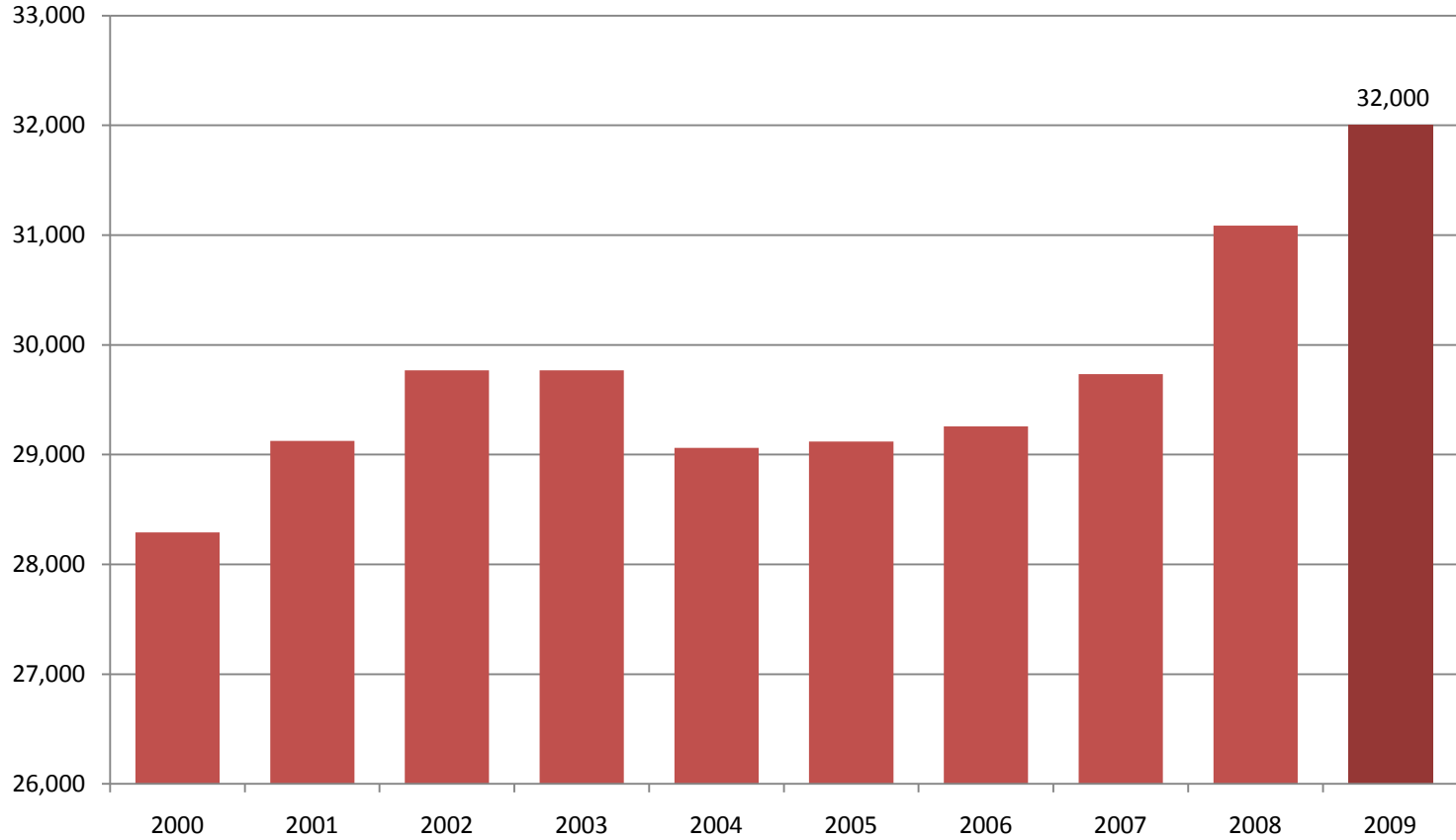
Contrary to National trends, growth in the male population outpaces females



IU - Bloomington Total Campus Enrollment

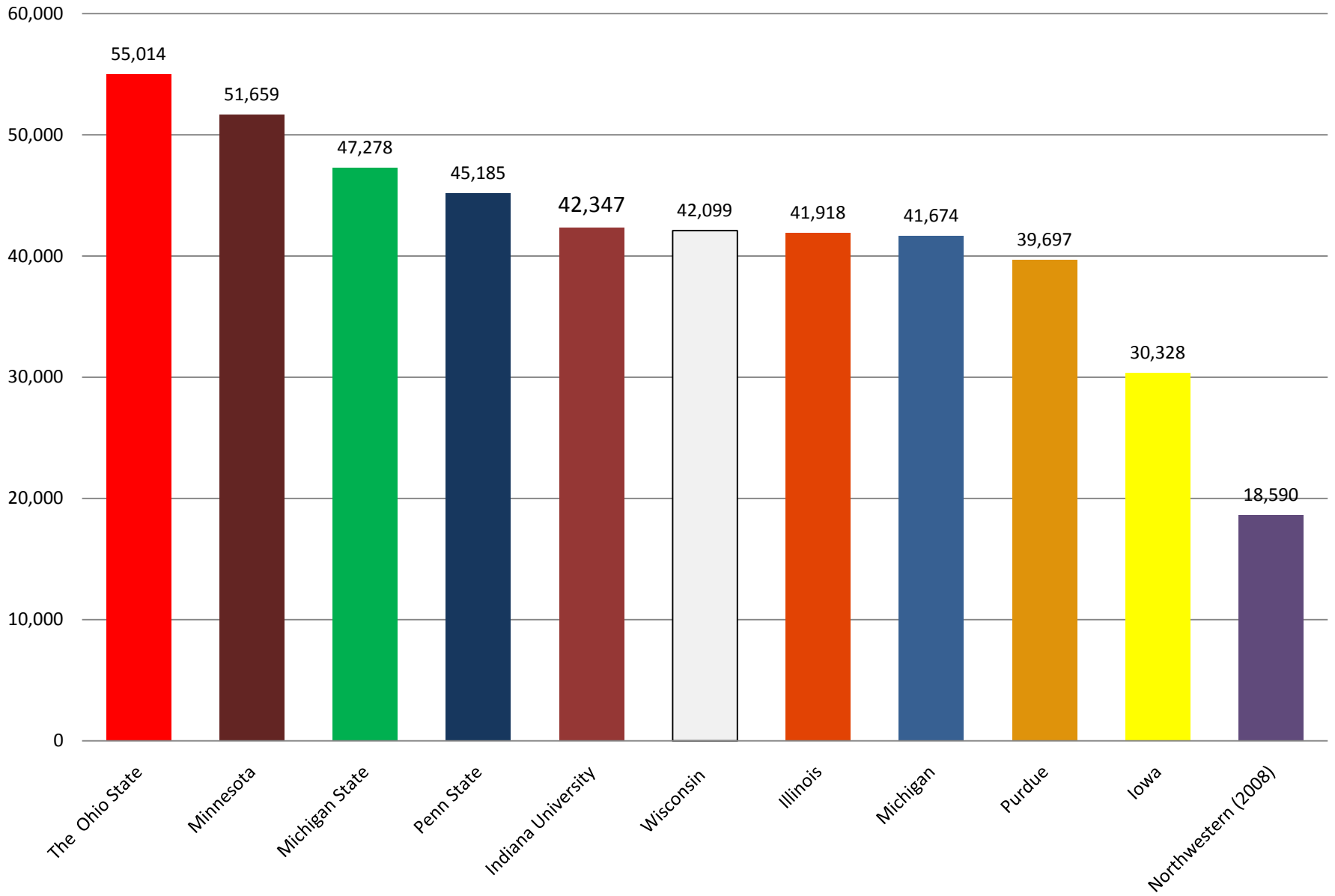


IU - Bloomington Undergraduate Enrollment

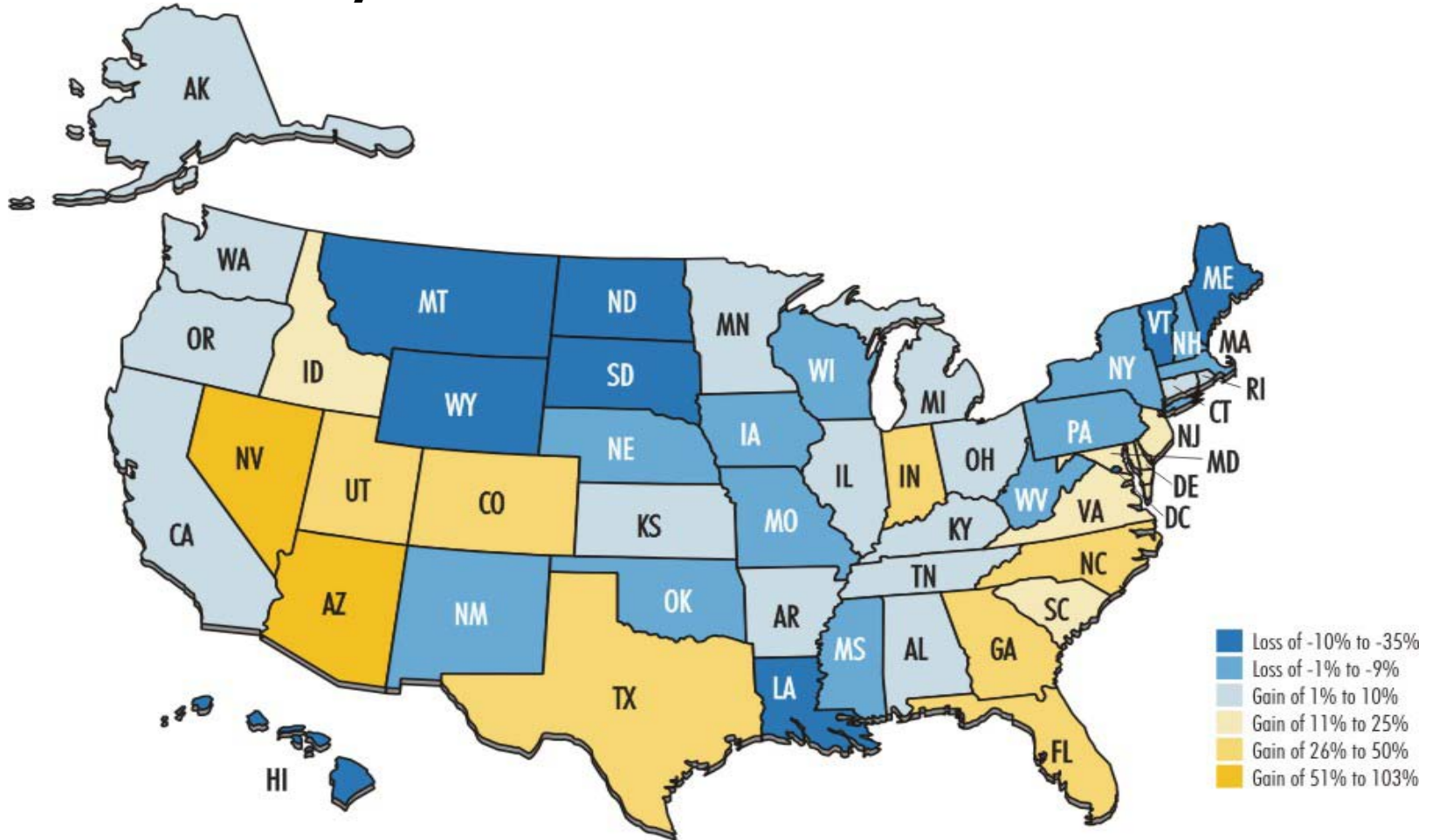


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Big 10 Enrollment Fall 2009

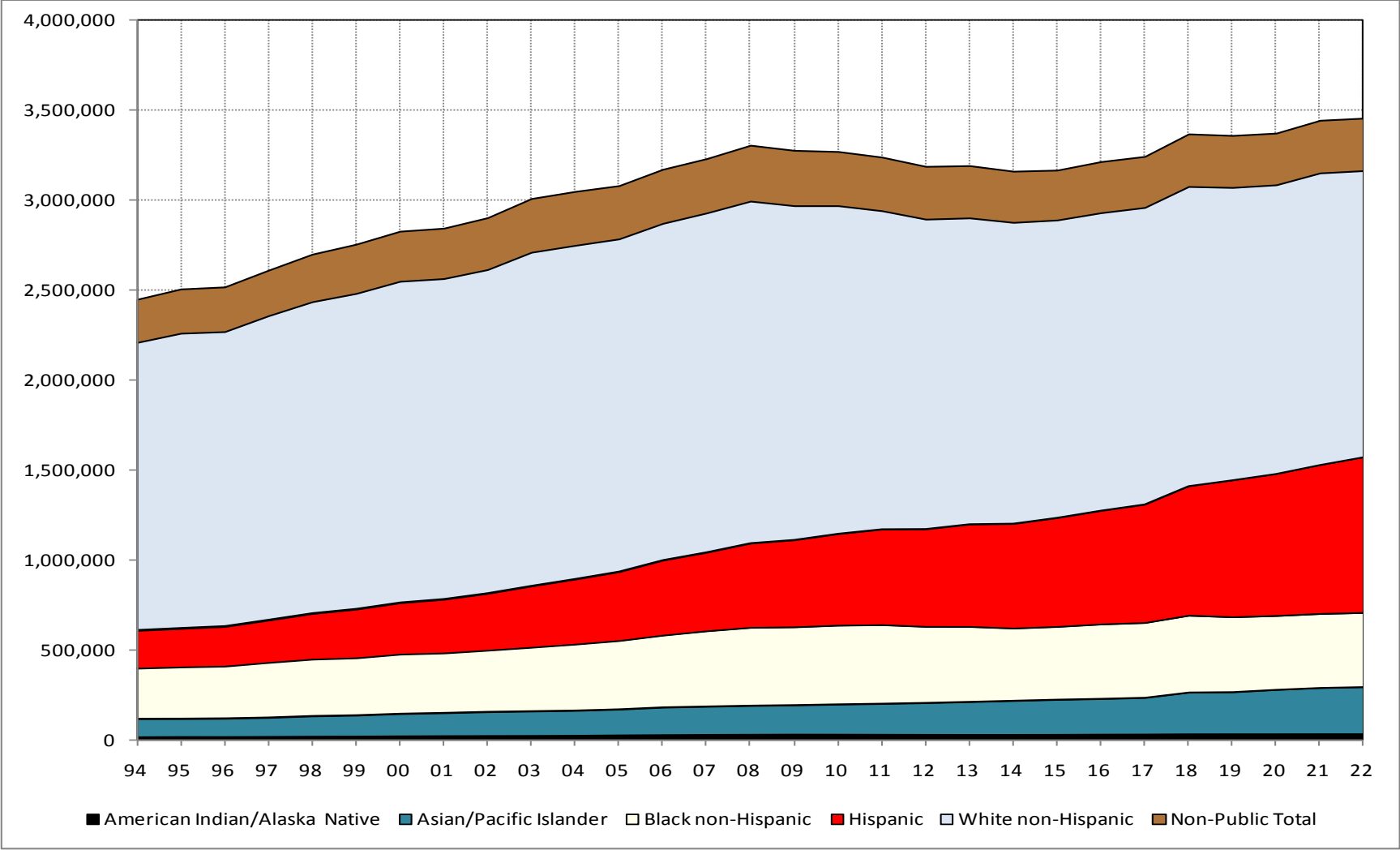


Projected Change in Number of HS Grads by State 2001-02 to 2017-18



WICHE

Number of High School Graduates, 1994-2022: United States



Source: WICHE/The College Board

Summary

- Strategic Enrollment Management requires aligning recruitment and financial aid practices with enrollment goals and providing seamless service throughout the student lifecycle.
- Our new direction for Enrollment Management addresses the primary goals of Indiana University.
- It is everyone's job to recruit and retain students.
- Requires outstanding team members.

Summary

- To be successful in re-shaping an entering class, you must align financial aid with your recruitment goals.
- At Indiana University, our need based and merit based institutional financial aid is designed to support recruitment goals and leverage resources for maximum effectiveness.

Questions/Answers

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