

STRATEGIC ENROLLMENT MANAGEMENT

SOU FORWARD



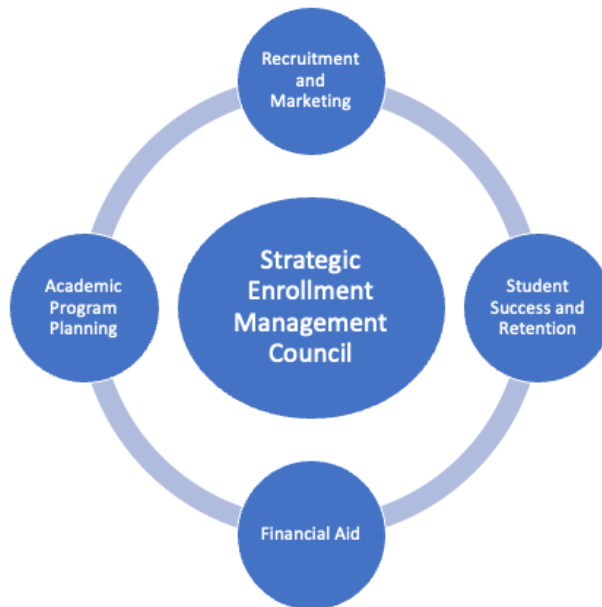
SPRING 2023

Introduction

Strategic Enrollment Management (SEM) at Southern Oregon University is a shared governance, institutional approach to managing and growing student enrollments to achieve the vision and mission established for the university. Co-chaired by the Provost and Vice President for Academic Affairs and the Vice President of Enrollment Management and Student Affairs, SOU established the Strategic Enrollment Council in 2019 to provide oversight, accountability, and a framework for enrollment related strategies to be debated and implemented. The Enrollment Council considers enrollment related strategies in the following four areas:

Recruitment and Marketing
Student Success and Retention
Financial Aid and Pricing
Academic Program Planning

Figure 1: SEM Organizational Structure



SOU is entering a new phase of service to our region and our students. Recent challenges have included devastating wildfires, a global pandemic, structural deficit, and reductions in state-provided operational support. However, challenges present as opportunities and with bold leadership and institution wide commitment to our mission, SOU can evolve into a stronger institution.

The purpose of Enrollment Management Forward is to memorialize recent changes and successes to enrollment strategies, highlight ongoing enrollment strategies, and present a process by which the institution can continue to engage in the next stage of its enrollment maturity - strategic enrollment planning through the Enrollment Council. With improvements to infrastructure and a renewed commitment to an institution wide enrollment discussion, SOU is poised to build upon the recent enrollment stability and build toward long-term enrollment growth.

SOU 2030: By 2030, SOU will achieve:

- 1. 7,000 degree-seeking headcount enrollment.***
- 2. 4,500 full-time equivalent enrollment.***

3. **Retention Rate: first-time, full-time retention rate increase to 81%.**
4. **Graduation Rate: first-time, full-time six year rate increase to 60%**

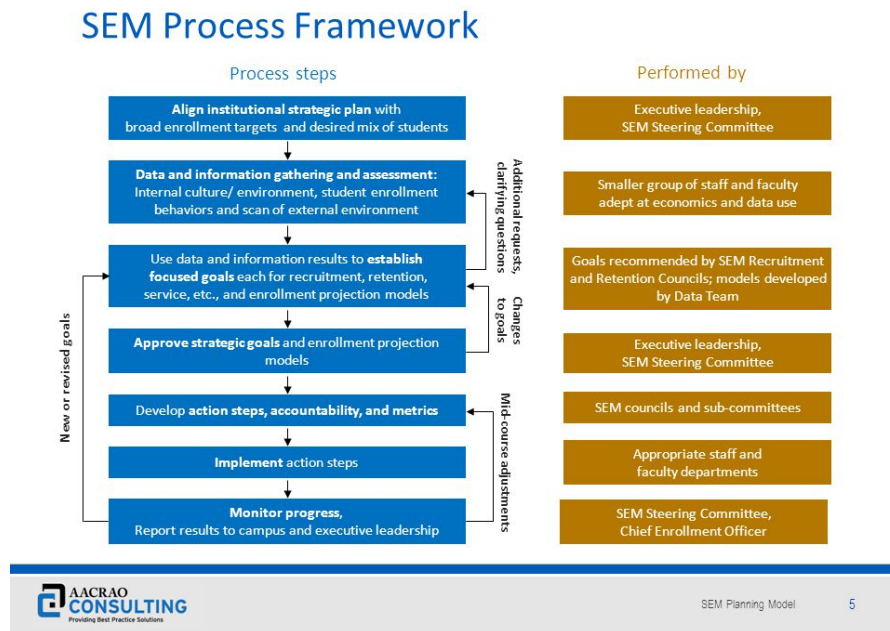
Strategic Enrollment Council

The Strategic Enrollment Council is an appointed body by the President to engage in and make recommendations to Cabinet regarding enrollment areas of focus and strategies to improve access, retention, and graduation from SOU. Specifically, the charge of the Enrollment Council is to:

1. Establish comprehensive goals for the number and types of students needed to achieve the desired future of SOU.
2. Improve students’ academic success by improving access, transition, retention persistence, and degree completion.
3. Enhance institutional success by enabling more effective enrollment and financial planning.
4. Create a data-rich environment to inform decisions and evaluate strategies.
5. Strengthening communications with internal and external stakeholders.
6. Increase collaboration among departments across campus to support enrollment goals; and
7. Identify, recommend, and monitor institutional enrollment strategies.

Chaired by the Executive Vice President and the Provost and Vice President for Academic Affairs, the SEM Council meets quarterly to review and make recommendations for institutional strategies related to the four subcommittees. Enrollment metrics are established by the Board and are tracked by Institutional Research [here](#).

Figure 2. The SEM Process Framework



Recent Improvements to Enrollment at SOU

Over the past three years, SOU has made significant improvements to infrastructure and strategies related to enrollment. The following table summarizes some of the major changes.

Table 1: Recent Improvements

Strategy	Short Description
Recruitment and Marketing Committee	
New CRM	A Constituent Relationship Management system is the database and communication system through which SOU and Admissions recruits prospective students. Target X provides a comprehensive prospective student database and communication platform.
Demand Builder*	Managed service through Ruffalo Noel Levitz that increases prospective student communications and strategies that grows the prospective pool from 30,000 prospects annually to approximately 100,000 per admission cycle.
AI Chatbot (RockyBot)	Allows for 24/7 communication via text with prospective students.
Search Engine Optimization	Established partnership with BrightEdge to automate search engine optimization for SOU web pages
Prospective Student Communication Audit and Architecture	Audit and review of messaging content and timing to upgrade our communications to best practice with prospective students. Prioritized messaging to include academic excellence, affordability, and co-curricular fit and opportunity.
RCC/SOU Transfer Council*	Formalized the management and attention to the transfer experience of students at RCC to SOU. Meets bimonthly to discuss the academic and student experience aspects of transfer
Faculty Ambassador Program	Formalizes three levels of engagement that faculty can engage with admissions in recruiting and marketing their discipline to prospective students
Territory Management	Admission recruiters are assigned territories and annual recruitment goals
K-12 data share agreements*	K-12 Student and family contact information provided at no cost to SOU. Enables SOU to communicate with a wider audience of prospective students about the benefits of attending SOU. Reduces dependency on purchasing names from College Board, ACT, and other sources and provides for recruitment of all high school students and families.
Community College Transfer Agreements*	Creates a dual admission/dual enrollment partnership with regional community colleges streamlining the transfer and reverse transfer experience for students.
Prospective Student Parent Portal*	Software through Demand Builder partnership with RNL that provides a platform and portal to communicate with parents which steps students should take through the admission and onboarding for new first year students
New Sports	Developed a return-on-investment analysis tool that provided information and analysis on the cost to provide a sport and the return of revenue by bringing in new students specific for the sport (e.g., golf, beach volleyball, etc.)

Kings Education*	Partner with Kings Education and the University of Oregon to recruit international students
Oregonian Advertising	Institutional Marketing office will continue to run digital display advertising as well as SEM for saturation in the Portland and Southern Oregon/Northern CA regions.
<u>Financial Aid Committee</u>	
Financial Aid Leveraging	Econometric model and service through Ruffalo Noel Levitz that customizes the institutional financial aid awards to prospective students. Right sizes merit and need based institutional aid funded through tuition remissions/waivers.
Financial Aid Wellness Checks	Financial aid department staff present in the student union in high peak times providing financial aid wellness checks
Estimated Award Letters	Financial aid now sends out estimated financial aid award letters to prospective students to better inform them of the aid students can expect to receive when they enroll at SOU. Previously, award letters were only provided when students register for classes.
<u>Student Success and Retention Committee</u>	
Navigate*	Coordinated system software through EAB enhancing the student experience, persistence, and retention. Through advising, predictive analytics, academic progression modules, Navigate is a student facing app providing systematic interactions helping students move through degree completion.
MySSP	New partnership with vendor to provide 24/7 access for students to receive mental health service and support.
Withdrawal Survey	Prior to a student withdrawing from SOU, intervenes with a mandatory survey where students identify issues that interfere with their continued registration. Provides for accurate diagnosing of retention obstacles and timely support of students.
OLLI/Staff Audit and SSCM	Includes OLLI and staff audit of coursework into eligible funding through the SSCM
CIP Coding for SSCM Inclusion	Review and update of CIP coding for courses to receive maximum funding from the SSCM.
Essential Skills Certificate	Upon completion of the general education requirements at SOU, provides for a Certificate rewarding students for gen ed completion. Improves retention by celebrating and credentialing an academic milestone comparable to an associate of general studies from a community college.

New Student Orientation Online Option*	Provides new student orientation information and programming for students who are not able to attend regular orientation programming in person. Previously, students who couldn't attend in person events matriculated without an orientation experience.
Affinity Groups*	For ethnic identity groups (American Samoan, Asian/PI, Black/African American, Hispanic/Latino Latina, Native American) developed affinity groups consisting of faculty and staff that support student persistence relative to the needs of the respective ethnic identities.
Strong Start*	Utilized additional funds through the legislature to growth the capacity of the SOU Bridge Program
Micro Credentials	Developed academic credentials for current students as they progress in their major degree as well as non-degree seekers
Established Dean of Students Office	Created the Dean's office to better advertise and promote student success resources and supports.
Created Social Justice and Equity Center*	Establish structure for intersectional student activities and programming promoting social justice and equity
Created Multicultural Commons*	Built a distinct space in the Stephenson Union for students with multicultural backgrounds to be together and support each other.
Connect Oregon*	State and region wide referral network for personal and community services, financial assistance, governmental services, and support agencies. SOU joined the network and can refer additional support services to individual students when SOU is unable to meet the students' acute needs.
Rebuild Career Services	In process of review and analysis of student learning outcomes for career services. Contracted with external expert to review and recommend an effective model to deliver career support and career planning.
Student Leadership Series*	SOU joined the National Society of Leadership and Success and created a local chapter to provide leadership development and mentoring for students.
American Samoa Pipeline (Island Raiders) *	With the partnership of the American Samoa Department of Education, the Island Raiders program provides a pathway to SOU enrollment and degree attainment.
Lithia Scholars Program*	Planning and implementation of a recruitment and support program specific to philanthropic gift from Lithia and Driveway Motors to develop, support, and build a pipeline of students from diverse backgrounds into college and career success.

**Diversity Enhancing Strategy*

2022-23 Enrollment Council Annual Prioritized Strategies

Each year, the subcommittees of the Enrollment Council present areas of focus to improve and impact their respective area of enrollment. These focus areas are considered by the Enrollment Council and presented as an informational item to the Board of Trustees Committee on Academic and Student Affairs.

Recruitment and Marketing Committee

Chaired by Nicolle Aleman and Zac Olson

- Adult learning - micro credentials, Market stackable credentials
- Demand builder - market expansion for prospective students
- Expand Raider Transfer Program
- Brand identity development
- Parent Communication (Parent Portal)
- Pre-College Programs matriculation rate improvements

Fall 2023 New Student Recruitment Goals for Fall 2023 (for a more detailed review of fall 2023 goals, please see the weekly funnel report provided by AVP and University Registrar)

Chart 1. New Freshman Enrollment Goals

	Fall 2022 Final	Fall 2023 Goal	Student Headcount	Percentage Change
Applications	2,099	2,217	118	5.6%
Admits	1,929	2,037	108	5.60%
Confirmed	785	829	44	5.61%
Enrolled	571	604	33	5.78%

Chart 2. New Transfer Student Enrollment Goals

	Fall 2022 Final	Fall 2023 Goal	Student Headcount	Percentage Change
Applications	503	531	28	5.57%
Admits	447	472	25	5.99%
Confirmed	365	385	20	5.48%
Enrolled	293	309	16	5.46%

Student Success and Retention Committee

Chaired by Dr. Matt Stillman and Dr. Carrie Vath

- Address Equity Achievement Gaps through Affinity Groups
- KPI Dashboard for Enrollment and Retention
- Navigate Predictive Analytics
- Identify Best Practices for Retention & Compare to SOU Practices
- Continue to review Withdrawal Survey data for trends (Ethnicity, Gender, Residency, First-Gen, Pell Eligible, Major, Early vs. Late)

- Develop and present Student Success Strategy recommendations to Enrollment Council at end of Spring term.
- Inventory all our current student support systems and identify redundancies and possibility for consolidation.

Chart 3. First-Time, Full-Time Retention

	Fall 2021 - Fall 2022	Fall 2022 - Fall 2023 Goal
Retention Rate (first-time, full-time)	65.6%	67.0%

Chart 4. All Undergraduate Fall to Fall Persistence

	Fall 2021 - Fall 2022	Fall 2022 - Fall 2023 Goal
Undergraduate Persistence Rate (all undergraduate)	76.1%	78.0%

Financial Aid Committee

Chaired by Kristen Gast and Josh Lovern

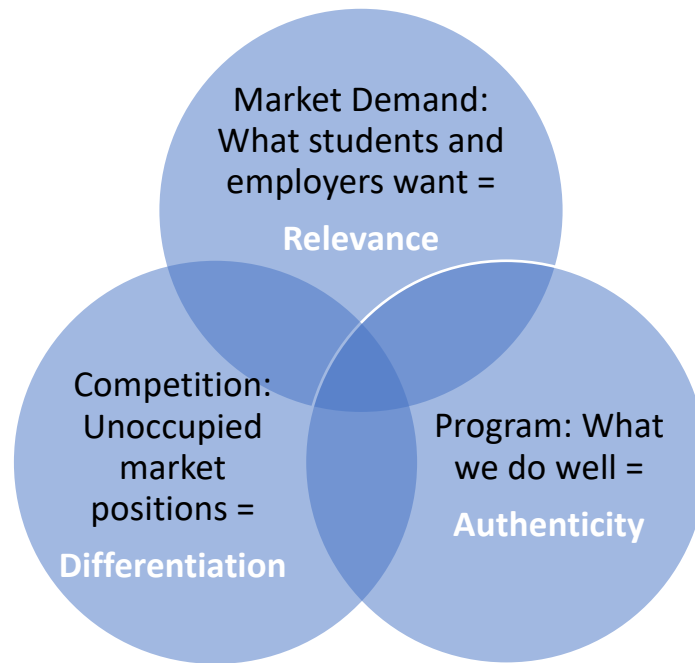
- Diversity Scholarship (incorporate into RNL leveraging?)
- FA leveraging monitoring and improvements
- Remissions policy development
- Budgeting for College/ Wellness checks
- COA survey
- FAFSA simplification initiatives
- Financial Aid Access

Academic Program Planning Committee

Chaired by Dr. Dan DeNeui

- Familiarize with LightCast labor market and program opportunity data
- Update Market Analysis in new program proposals
- Explore strategy for dual enrollment with RCC in SOU's low-filled, transferable courses

- Identification of competitive advantage areas



Authenticity: In what areas does the institution perform well and produce demonstrably better results than its competitors? Which areas stoke the passions of faculty and staff? With a little more effort, can the institution make substantial gains from the relative strength of these areas?

Differentiation: What are the areas where an institution provides a unique program or experience relative to the competition? Are there any unique offerings that are not provided by other institutions? What makes an offering unique may be a result of its category or type, volume, a specific characteristic, its nature, its geography, or any combination thereof.

Relevance: What is the market demand for an institution's programs? What are its prospective students looking for or interested in? What kind of graduates are regional employers looking for? Unique characteristics become important when they are attractive to potential students. Assessments of market demand should provide evidence of demand volume (how many students are willing to enroll and what is the placement rate of graduates?), levels of price consciousness/sensitivity (are they willing to pay or pay more?), and sustainability (will student demand and relevant jobs continue to exist 10 to 15 years from now?).

Other Strategies and Areas for Exploration/Development

The following chart of strategies are those that are in varying degrees of development and are actively being considered as future prioritized strategies.

Table 2: Other Strategies, Early Development

Strategy	Short Description
New Key Performance Indicator Dashboard	Institutional Research is working on a new executive dashboard for enrollment displaying the Key Performance Indicators established by the Board of Trustees.
College App/LightCast/Digital Platform	Partnership with LightCast providing labor market demand and program opportunity data.
Alumni Ambassadors	Building on the success of the faculty ambassadors program, train alumni to share their success stories with prospective students.
Financial Literacy*	Explore new opportunities to enhance the financial literacy of prospective and current students.
New TRIO Grants (Upward Bound/GEAR UP) *	Apply for upcoming GEAR UP and Upward Bound federal TRIO grant programs
Transferology	Explore the possibilities of transfer students receiving a full transcript review of articulation and transfer credit evaluation.
Guided Pathways, Major Maps	With community college partners, SOU prescribes courses of study for each baccalaureate program with first two years of student at the community college enabling transfer students to enter SOU major ready.
Hispanic Serving Institution*	Develop the framework and pathway for SOU to achieve Emerging then full Hispanic Serving Institution designation.
Student Affinity Groups*	Evaluate effectiveness of affinity and expand or modify as needed. As each affinity group finishes forming and norming, expansion of student support strategies specific to each group will occur.
Remissions Policy	Develop institutional policy for budgeted and automatic remissions awarding, budgeting, and monitoring.
Academic Advising Program Review*	Embark on a full program review for academic advising to determine if the current model needs to be adjusted.
Community Audits	For low enrolled classes, offer available seats to community members as an audit option.
Transfer rights for all regionally accredited community colleges	Provide full junior status and waive lower division general electives for all transfer students (including WUE and out of state) who transfer with a transferable associate degree.

Minors to Certificates	Convert appropriate minor academic programs to a certificate
Diversity Scholarship*	Complete review of and develop expanded diversity scholarship program for new and continuing students.
Career Connections*	Review consultant proposals for strengthening SOU's ability to provide career services to students
Stop Out Re-enrollment*	Consider partnership with ReUP, pay for performance company that recruits back students who have stopped out from SOU. No current strategy is employed for stop out recruitment.
Professional/Continuing Education	Develop process by which corporate and community partners might utilize SOU resources and expertise to advance professional education.
UC Merced Partnership	A Pathway agreement with UC Merced to create enrollment pathways for domestic, international student for undergrad and grad degrees.
Advising Learning Outcomes Assessment	As part of a normal program review process, academic advising will review and evaluate academic advising learning outcomes and overall program success.

**Diversity Enhancing Strategy*

In connection with the need to prioritize strategies for the 2023-24 academic year, the SEM Council leads conversations promoting long-term enrollment (headcount and/or FTE goal; retention and graduation rate goal) that sets a NorthStar goal. This goal sets the direction for SOU's commitment and focus for growing student enrollment and achieving student success.

SOU 2030: By 2030, SOU will achieve:

- 5. 7,000 degree-seeking undergraduates headcount enrollment.***
- 6. 4,500 full-time equivalent enrollment.***
- 7. Retention Rate: first-time, full-time retention rate increase to 81%.***
- 8. Graduation Rate: first-time, full-time six year rate increase to 60%***

SOU 2030 will be accomplished as faculty and staff incorporate an ethos of student-focused service and personal responsibility memorialized through "I CARE."

I: Individual – each student is valued as an individual recognizing that each has unique qualities and concerns;
 C: Cares Notes – faculty and staff utilize CARES NOTES to coordinate the care of each individual student;
 A: Accessibility – each student is aware of and receives full access to the resources of SOU and the community;
 R: Registration – registration is the key to student progression to graduation; SOU systems, strategies, faculty, and staff encourage students to register persistently as full-time students; and
 E: Empathy – SOU faculty and staff extent empathy to each student and each other.

Strategic Enrollment Strategy Planning: How a Strategy Becomes a Strategy

The Strategic Enrollment Council committees follow the general process below to determine which annual strategies are endorsed and prioritized by the Council. As the annual plan continues, the steps of the planning process are recursive - data are collected; KPI's are reviewed; new performance indicators are added as the environmental scan identifies new challenges/opportunities; strategies are developed, prioritized, and implemented; all the while, the process remains data-informed.

Step 1: Preparation and Data Analysis

- Key Performance Indicators (see Appendix 1 for a list of common KPI's) are identified
- Data collection and review
- Previous year's strategy assessment
- Situational Analysis
 - Strengths: Existing characteristics (programmatic, physical, and financial) that clearly contribute to institutional success and the achievement of enrollment goals and that are measurably better than those of the competition (e.g. quality of faculty, location, OSF, etc.).
 - Weaknesses: Existing characteristics that detract from institutional success and the achievement of enrollment goals and that are measurably worse than those of the competition (e.g. cost of housing, lack of weekend activities/university district, etc.).
 - Opportunities: External conditions that allow for opening new markets, launching new programs, strengthening a market position, or increasing organizational strength due to the ability to realize new efficiencies (e.g. growing employer demand, LAD Sustainability Institute, etc.).
 - Threats: Potential external conditions that could become obstacles to institutional success and achievement of enrollment goals, or that threaten to close existing markets or programs, or reduce organizational strength (e.g. reduced state support, OIT program offerings in Medford, etc.)

Step 2: Strategies

- Strategy development
- Tactic identification
- Return on Investment considerations
- Strategy Prioritization

Step 3: Enrollment Goals (goals developed after strategies are identified are far more achievable and accurate)

- Enrollment projections from prioritized strategies
- Establish Annual Enrollment Goals

Step 4: Implementation and Continuation

- Implementation of the annual plan
- SEM Council membership adjustments if needed and quarterly meetings scheduled
- SEM Council monitors, evaluates, and makes plan adjustments if needed

The SEM Council meets quarterly to review data and monitor progress on the strategies identified for the year. The Council must continue to track and monitor the strategies, KPI's, and update the plan where needed based on current data/market trends or other changes.

Appendix 1: Key Performance Indicators (adapted from *Strategic Enrollment Planning*, Ruffalo Noel Levitz, 2016)

Key performance indicators are commonly acknowledged measurements critical to the mission and fiscal health of an institution. As a rule, they:

- Are institution specific, data-derived measurements that provide the foundation for determining the current state of the institution and, when matched with historical comparisons, are relevant for the creation of the situational analysis (often in the form of SWOT analysis) and overall strategic planning.
- Reflect the effectiveness of broad, cross-departmental cooperation.
- Provide points of comparison to peer, competitor, and/or aspirational institutions.
- Are complex and expected to improve over a long period of time.
- Are supported by and dependent on multiple performance indicators.

Common KPI's

- Enrollment (headcount and FTE for overall, online, undergraduate, graduate, in-state, and out of state)
- Student quality (average SAT/ACT, average high school GPA)
- Student progress (new freshman first-to-second year and first-to-third year retention, and four-, five-, and six-year graduation rates)
- Program quality (student-faculty engagement [NSSE/CCSSE scores], student-faculty ratio, class size, profile, undergraduate research, and graduate research)
- Diversity enrollment and cohort profile (numbers enrolling and percentage of students from diverse backgrounds or under-represented groups and their success rates [achievement gaps], gender balance, full-and part-time ratios)
- Fiscal health (enrollment-related revenues and operating expenses)

Performance Indicators (PIs)

It takes improvement in multiple PIs to impact any one of more KPIs. Often, PIs can be addressed more readily than KPIs and are part of the work done among two or more functional areas.

Common Performance Indicators

To Support Enrollment KPIs

- Undergraduate enrollment by term
- New freshman enrollment, admits, applications, and inquiries by term (funnel data)
- Transfer enrollment admits, applications, inquiries by term (funnel data)
- Undergraduate second-to-third year retention rate, third-to-fourth year retention rate, and beyond fourth-year graduation rate
- Graduate enrollment, admits, application, and inquiries by term (funnel data)
- Graduate retention rate
- Graduate graduation rate

To support enrollment profile (diversity, academic) KPIs

- Inquiry profiles
- Applicant profiles
- ACT and SAT market-share profiles

To support retention and graduation KPIs

- Student satisfaction indicators
- Student engagement indicators

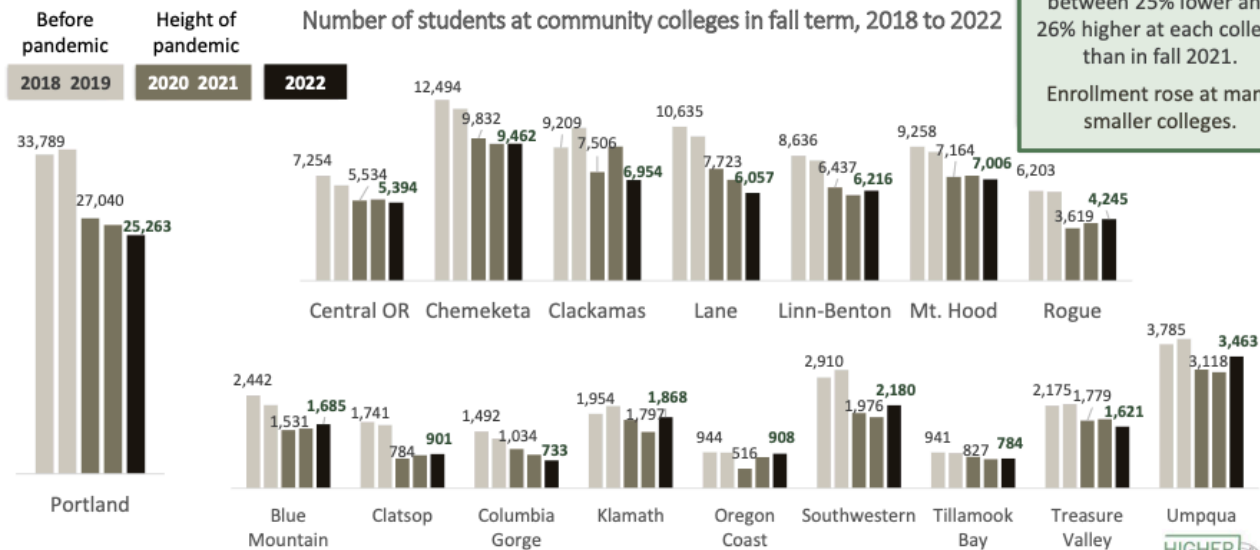
- First-to-second term persistence
- Grade point distributions by student cohort and by course
- Number and percentage of students not able to enroll in a desired major
- Number and percentage of students not able to enroll in desired courses
- DFW courses
- Student debt burden and profile
- Award gaps between student need and actual financial aid awards

To support fiscal health KPIs

- Net tuition revenues
- Auxiliary (housing, dining, and bookstore) total revenues and net revenues
- Education and general costs by student subgroups (by program, ability level)
- Net tuition revenue and scholarship (remissions) cost by student subgroups (ability level and resident/non-resident)
- Net tuition revenue and financial aid cost by needy student subgroup

Appendix 2: Enrollment Data

Headcount enrollment stabilized or increased at 10 community colleges and declined at seven

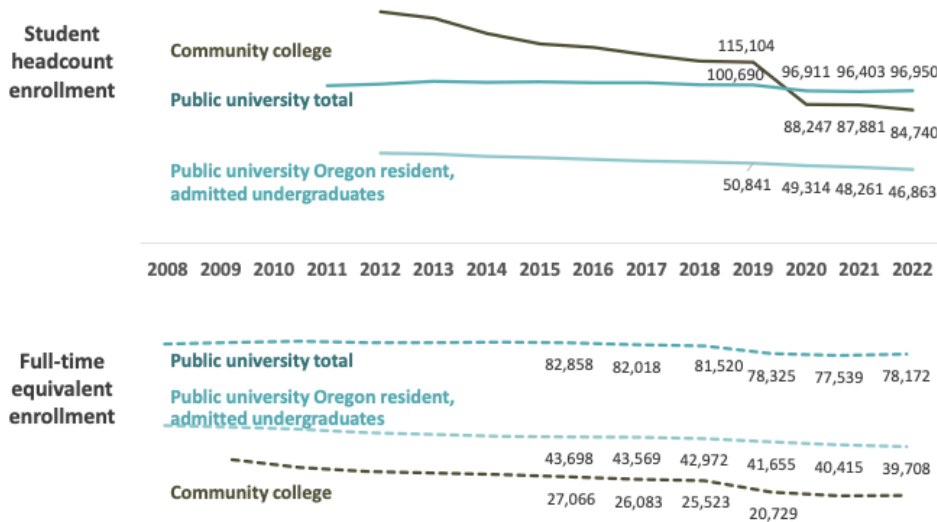


The number of students is between 25% lower and 26% higher at each college than in fall 2021. Enrollment rose at many smaller colleges.

4 Source: Fall enrollment data provided by aggregate counts by community colleges. Data show headcount enrollment. Students enrolling in more than one institution in fall are included in both institutions' counts. Full-time equivalent counts in the colleges as the total number of clock hours in which all students enrolled divided by 510.



The steep changes related to the pandemic and the greater stability today are evident in the long-term trend

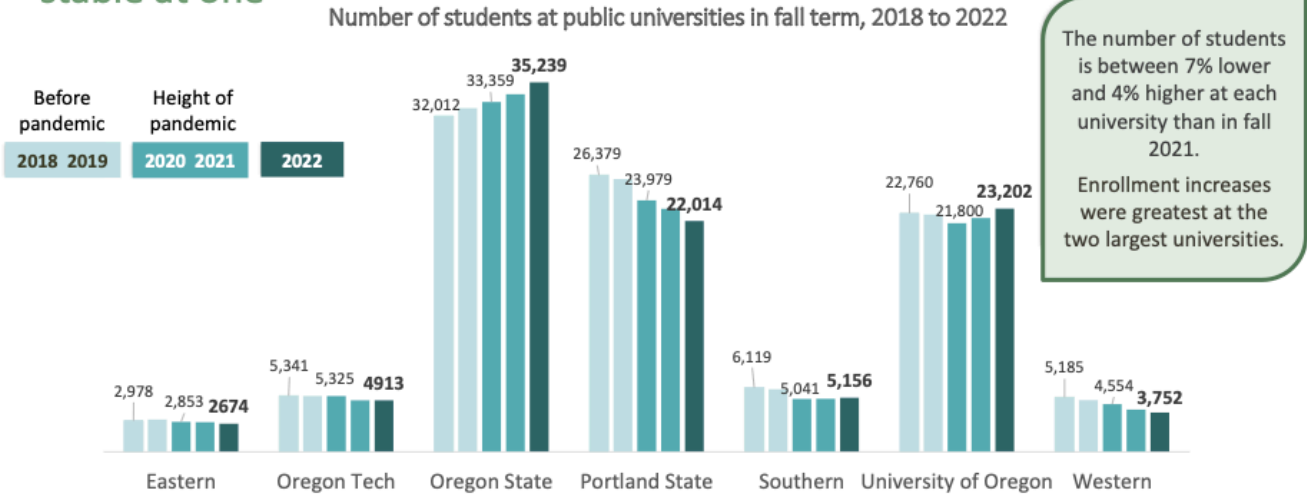


Enrollment has stabilized but not returned to pre-pandemic levels. Full-time equivalent enrollment rose slightly in both sectors this fall, compared to 2021.

3 Source: Some numbers may differ slightly from earlier published reports as data were finalized. Fall enrollment data provided by aggregate counts by community colleges and as individual student records by public universities. Individual analyses are made by HECC staff. Notes: Students enrolling in more than one institution in fall are included in both institutions' counts. Full-time equivalent counts are defined in the colleges as the total number of clock hours in which all students enrolled divided by 510, and in the universities as credit hours divided by 15 at the undergraduate level, by 12 at the graduate level (excluding PhD), and by 9 at the PhD level.



Headcount enrollment rose at three universities, fell at three, and was stable at one



6 Source: Some numbers may differ slightly from earlier published reports as data were finalized. Fall enrollment data provided as individual student records by public universities. Individual analyses are made by HECC staff. Notes: Students enrolling in more than one institution in fall are included in both institutions' counts. Full-time equivalent counts are defined in the universities as credit hours divided by 15 at the undergraduate level, by 12 at the graduate level (excluding PhD), and by 9 at the PhD level.

