Bridging the Gap between Recruitment and Retention:

A STRATEGIC ENROLLMENT MANAGEMENT PLAN FOR TRANSFER STUDENTS

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Why Plan?

“The nicest thing about not planning is that failure comes as a complete surprise and is not preceded by a period of worry and depression.”

- John Preston  
  Boston College
“A Call to Action”

“Local” Challenge
- High school graduating classes are getting smaller.
- Price of education and student debt on the rise = more students attending 2 year colleges and schools prior to attending a 4 year institution. (*National Challenge)
- Heightened panic over budget issues
- Increased focus on the importance of diversified student audiences
- Mandate to grow enrollment for most adult student serving programs (or mandate to grow revenue?)
- Transfer Rates are the highest they have ever been.
  - About 1 in 3 students who enroll in either a four-year or two-year college will probably transfer at some point (New York Times, 2010)
- Most institution’s policies, procedures and organization structure are designed to serve traditional first year students.
  - Orientation, Registration window/process, Support Services, Clubs/Organizations, Housing, Course offerings/schedule.

National Challenge
- Adult market growing at a 1,000,000 per year but market is saturated.
- President Obama’s 2020 Goal
- Changing Student Demographics (Post-traditional Learner)
- Changing Nature of the Economy/Jobs
- 63 percent of jobs in the U.S will require postsecondary education by 2018!
Things to think about first...

- What are the needs and motivations of a student who transfer to your institution?

- Where are your students transferring from, a two year or 4 year?

- What is the greatest need of a student to help them transfer successfully and graduate from your institution?
## What Do They Need & Want to Know?

<table>
<thead>
<tr>
<th>Survey Question</th>
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<tr>
<td>Availability of a particular course or program</td>
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<td>Proximity of college to home or work</td>
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<td>Cost of tuition and fees</td>
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<td>Day and time courses meet</td>
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<tr>
<td>Reputation of the college or program</td>
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<td>Accreditation of the college or program</td>
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<td>Availability of online instruction</td>
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<td>Length of time to complete my studies</td>
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<td>Transferability of previously earned credits</td>
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<tr>
<td>Something else</td>
<td>3</td>
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Aslanian Market Research, 2013
What Do They Need & Want to Know?

A recent study of 1,708 transfer students (who responded to the Second-Year Student Assessment between 2010-12) found that these students had specific requests for assistance in four major categories: academics, advising, career planning, and finances:

- 49 percent of college transfer students newly enrolled at four-year public institutions requested tutoring support in one or more of their courses;
- 42 percent of transfer students at four-year private institutions wanted help with study skills;
- 50 percent of transfer students at two-year schools wanted help in developing a written plan leading to graduation;
- 63 percent of transfer students at four-year public institutions wanted help in discussing options for financing the rest of their college education;
- 78 percent of transfer students at four-year public institutions requested information about internships in their majors; and
- 62 percent of the transfer students at four-year private institutions asked for information about advantages and disadvantages of their major and career choices.
Things Have Changed...

**Enrollment/Marketing**
- What students expect vs. what student get
  - Want more customize approach (Concierge Model)
  - What access to information (All of it, right now 😊)
  - Want promote responses to questions/concerns (24 – 48 hours)
  - What transfer evaluation done yesterday...
  - 4 H’s
    - How much? (Tuition, Fees, and Scholarships)
    - How long? (Academic Advising and Guidance/When do classes meet?)
    - How many credits will you transfer in? (Transferability of Courses)
    - How are you going to help me get a job? (Career Development, Job Placement)
- The traditional search process has changed
  - Top 5 search modalities
    - Internet Search Engines (SEO)
    - College Search Sites
    - Mail to Home
    - Emails
    - TV Ads

**Retention/Graduation**
- Students are looking for multiple formats to receive their education (classroom/hybrid/online) and want college to be close to home and work
- Career Development/Exploration vs. Career Advising
Types of Transfer Students

- Transferring from a local community or technical college
- Returning to college after stopping out for any variety of reasons
- Looking for a fresh start after a poor experience at their first institution
- Career or educational change
Tend to be more focused, having previously selected a major or program of study, and have an idea of the career they want to enter.

They often have career, family, financial, and other obligations that can compete with their educational plans.

Transfer students may have other characteristics that create enrollment challenges for a campus, such as:

- More likely to be nontraditional students, first-generation students, working students, and students with high financial need;
- Experiencing transition issues (i.e., “transfer shock”);
- Lower levels of student engagement than traditional first-year students;
- Greater need for developmental coursework early in their academic career; and
- Veterans returning to civilian life.
Did I Mention Things Have Changed...

- My First Student Experience 12 years ago...
  - Student statement: “Thank you so much for meeting with me and answering all of my questions, you have been a great help.”

- My Experience with a student 12 days ago...
  - Student statement: “I emailed you 5 minutes ago, why haven’t you responded? You are an idiot, I hope you die from liver disease.”
Why are you here???

• What do you want to get out of today’s presentation?

• What are the challenges that you face as an institution in dealing with transfer students?
  ○ Enrolling, retaining, and graduating
  ○ Technology, staffing, resources, tuition, financial aid, policies/procedures, etc...

• What are some of your strengths?
Where Do We Start?

- Success Criteria for Enrollment Management
  - 4 S’s
    - Strategic
    - Systemic
    - Scalable
    - Sustainable
Organizational Readiness

- Create a Shared Need
- Shape a Vision
- Mobilize Commitment
- Launch a Change “Package” or “Wrapper”
Organizational Readiness

“Remember, blame is the absence of responsibility...”
What Next?

- Identify Realistic Measurable Goals
- How You Will Measure Success And Accountability
- Develop a Committee/Leadership Team
- Identify Partners and Key Stakeholders
Realistic Measurable Goals

- Set annual transfer student recruitment, retention and or persistence headcount goals
- Add to the annual Enrollment Management plan that identifies the institutions goals
- Long-term goals should focus on five all encompassing enrollment management fundamentals based on “industry” exemplary practices
  - Enrollment Planning
  - Marketing Communications
  - Pipeline Management
  - Operations
  - Technology
Measure Success and Accountability

- **Baseline what you know**
  - Persistence data
  - Course-to-course
  - Enrollment term-to-term
  - Progression Rates
  - Completion Rates
  - Compare to new enrollment targets (needs) if they exist
  - **Group work:** What are your successful students doing and what are their experiences?
Data Collection

- Identify effect ways to collect data about your students...
  - Secondary Trend Data
    - Lumina, Noel Levitz, Aslanian
  - Primary Market Research
    - Customized survey of the market
  - Audience Analysis
    - Customized surveys of constituencies
      - Adult Student Priorities Survey (ASPS)
      - Adult Learner Inventory (ALI)
      - Priorities of Online Learners (PSOL)
      - Focus Groups (Internal and External Stakeholders)
Key Action Steps...

- Move away from a de-centralized model to a centralized approach
- Coordinate communications across enrollment and academic affairs departments
- Develop owners/experts and create accountability throughout the enrollment pipeline
- Institutionalize initiatives as part of the culture of the institution
Three Focus Areas
Technology

- The Web – Student Services
  - Tutorials
  - Forms
  - Learning Tools (Lynda.com)
  - Helpful Links
  - FAQ’s (Can be linked through CRM Tool “Ask Us!” “Ask Ben”)
  - E-Transcripts
  - Find your Advisor (E-Advising)
  - Contact Us
Key Performance Indicators, Metrics and Reporting

- Outreach
  - Lead/Prospect Generation
- Transition Activities and Support
- Academic Advising and Success Coaching
- Enrollment Growth & Learner Success
- Marketing & Content Management
- Retention Support Services
- Academic Operations
Why Organize?

“Organizing is something you do before you do something, so that when you do it, it is not all mixed up.”

A.A. Miline
Moving Forward

- **Recruitment**
  - A student enrollment experience is shaped by access to program information; recruitment should be viewed as multi-functional process of drawing people into programs. Marketing materials should reflect that experience.

  - An institution must market programs effectively providing relevant and detailed information about programs, through multiple platforms (Printed, Social Media, Web/Email) with customized targeted messaging.

  - Leverage CRM tools to track, follow up and assess communication campaigns (Align with Business Processes)
    - Roll over the prior year transfer inquiries to the following fall pool. You can continue to recruit transfers for two to three years by understanding that there are many reasons for a student to begin the process and then decide to delay enrollment.

- **Small Changes go a long way...**
  - **Build Relationship with Local Community/Technical College**
    - Schedule re-occurring office or tabling dates/times
    - Send annual or semester updates to advisors
    - Schedule Transfer Advisor update events on your campus
    - Cross train “traditional” Admissions staff to recruit and work with transfer students
    - Get your information on their “stuff” (i.e. contact information on website, co-marketing campaigns)
    - Get on their email/list serve to get updates
    - Your two year advisors can be your best recruiters😊
    - Change your denial letter, encouraging students to enroll at local two year. (College Access Programs)
    - Create Scholarship programs with local two year colleges
Moving Forward

- Recruitment Continued...
  - Pre-Enrollment Advising
    - Transcript Evaluation (Unofficial Evaluations)
    - Degree Planning (Equivalency, DARS, Transferology)
    - Career Exploration
  - Create Micro-Site (choose.metrostate.edu)
    - Program Planning Guides
    - Articulation Agreements
  - Partnership Programs (BS Completion, Dual Admissions, Articulation Agreements) also great retention tool!
  - Transfer Webinar
  - National Student Clearinghouse
  - Collegefish; Zinch; Chegg
Moving Forward

**Application Process**
- What are your requirements?
  - Essay
  - GPA
  - Transcripts (E-Transcripts, Transcripts Waiver)
  - Appeal Process/Academic Forgiveness Policy
- Is it simple and easy to navigate?
- Is it transfer student centered?
- Are you asking the rights questions?
- Are you communicating on the same level as you would with your “traditional” students?
Recruitment Continued...

A 10-Point Checklist for Recruiting College Transfer Students

1) Do you have dedicated admissions staff who are trained to respond to transfer student issues? (My recommendation: Train all admission staff to work with transfer students)

2) Are your current processes transfer-friendly? (Application Process, Admissions requirements)

3) Do you have dedicated resources on your Web site for transfer students? If so, are they easy for transfer students to find? (Veterans)

4) Do you have special visit days just for transfer students? (Transfer Day, Transfer Webinar, Admit Day)

5) Do you have effective orientations and intakes for transfer students?

6) Have you adequately communicated your willingness and eagerness to accept transfer students on your campus?

7) (The remaining points are specifically for four-year institutions) Have you built relationships with organizations like Phi Theta Kappa to identify excellent students from the community colleges in your region?

8) Have you reached out directly to community colleges to establish more sustainable relationships and partnerships?

9) Do you have up-to-date articulation agreements you can readily communicate to prospective transfer students? (Program Planning Guides)

10) Do you make visits to community colleges to provide personal attention to prospective transfer students? (Transfer Day)
Moving Forward

Retention
- Retention is not separate from recruitment!!
- Admit Day
- Career Path Development (Early and often)
- Housing, Financial, and Job resources (Can you set aside on-campus jobs for these students?)
- Milestone Recognition
- Mentoring Programs (Student Ambassador Programs)
- Coach/Accountability Partner
- Goal Setting, Planning, Pace
- Customized/Online Orientation and Registration Process
  - On-line experience should mirror on-campus experience
  - Don’t short change your transfer orientation, make these students feel valued (Alumni/Employers)
- Retention programs must be intentional
  - Intrusive
  - Requires Leadership
  - Requires Structure
  - Requires integration
- Leverage CRM tools to track communication and student experience from enrollment to graduation
  - Identify other tools (early alerts)
- Must empower students to develop relationships
  - Internal and external to the learning environment
  - Onboarding process
    - Help cultivate career and educational goals from the beginning. In-depth interactive goal-setting activities will help students gain confidence, motivation, and will help students identify what areas that want to pursue.
Moving Forward

• Retention Continued...
  • One Stop Shop Service (Gateway Student Services)
  • Campus Operation Hours
  • Student Organizations (Student Senate)
  • Financial Planning (How are you going to pay for school and stay out of debt? And or How do I manage paying for school and all of my other responsibilities?)
  • Attendance Policy
  • Campus Communication (Make it Personal!)
    • All campus communication needs to be tailored for transfer students
      • Financial Aid
      • Housing
      • Support Services
    • Communication Preference
      • What type? (Text, email, social media)
      • Message/Subject Line
      • Day of the week
      • Are you over communicating or under communicating?
Moving Forward

- Advising
  - Pre-Enrollment Advising
  - Unofficial or Official Transcript Evaluations
  - Degree Planning
  - First Term Registration
  - Career Exploration
  - Advising = Teaching
    - Align advising with educational tenets of your institution
      - Training
      - Advising & Adult Learning Theory/Best Practices
      - Responsibility/authority in students and faculty
      - Cultural aware approaches and training
      - Competence through diverse learning strategies
      - Developmental, Intrusive, Prescriptive, appreciative, mentoring
**Additional Effective Strategies**

- **Extend Campuses (Online, Satellite, Partnership Programs)**
  - Shared Services

- **Reverse Transfer**
  - Students will have the opportunity to finish their AA, great for recruitment (helping 2 year institutions with graduation rates) and retention

- **Enrollment/First Term Retention**
  - Application Process/Requirements
  - First Term Programming (Metro 101, Student Success Day, Orientation, Cohort programs, Transfer Student Groups)

- **Course Offering and Scheduling**
  - Convenient schedules
  - Multiple formats
  - Adequate supply of courses at the right time/Year-long Scheduling
  - Researching innovative ways to deliver curriculum
    - Differing Models (CFA – competency based assessments; Project-based Learning, PLA – prior learning assessments)
Additional Effective Strategies

• Study your recruitment and retention trends
  ○ Identify the characteristics of what transfer students look like at your institution.

• Get the data!!!
  ○ Identify natural gaps or breaks that occur (Conversion, Yield, Attrition, and Graduation rates)
  ○ What do the “successful” students at your institution do and or look like?
  ○ What do the “non-successful” students at your institution do and or look like?
    ✷ Fit (Can’t be everything to everyone)
      ○ The good, the bad and the ugly...
    ✷ Attract New Populations
      ○ The good, the bad and the ugly...
    ✷ Identify areas for Improvement

• Train staff and faculty😊
  ○ Does your staff and faculty know what these students need and how to effectively serve them? (Customer Service 1 on 1)
“Final” Steps

- Anchor the change (4s’s – strategic, systemic, scalable, sustainable... Second Nature)
- Make data driven decisions and changes
- Celebrate Wins – Gain Organizational Confidence
- Realize Institutional Commitment – Project Resource Needs
- Implement Lean Methodologies
- Focus on the Student Experience from Prospective Student to Graduate
Questions
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Sources