



Eastern Oregon University

Consulting Audit Report September, 2007



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Introduction

SEM WORKS, an enrollment management consulting firm, was hired by Eastern Oregon University (EOU) to complete an enrollment management audit. The audit was conducted August 10-15, 2007, by Dr. Jim Black, hereafter referred to as the consultant. Findings from the consulting visit are presented in this report along with related recommendations.

Methodology

The four-day consulting visit included interviews with groups consisting of students, community members, faculty, staff, administrators, and senior management. Prior to the site visit, the consultant reviewed documents and marketing materials provided by the institution. During the visit, additional information was supplied to the consultant.

Using a combination of the physical evidence described above along with secondary data sources, on-campus interviews, and direct observations of existing practices, the consultant utilized a research method known as “triangulation” to validate findings. Any finding supported by all three research techniques was considered to be valid. The consultant used a complementary method called “pattern matching” to validate findings that did not appear to be triangulated. Pattern matching describes reoccurring themes that emerge from one or more of these research techniques.

Recommendations in the report are prioritized using the following rating scheme: MC (mission critical), E (essential), and D (desired). The university is encouraged to begin work first on those items denoted as “mission critical.” In year two of implementation, address the items listed as “essential,” and in year three, work on items that are identified as “desired.”



EOU Context

Metaphorically, EOU is in the midst of “the perfect storm.” The combination of a self-study accreditation, collective bargaining, changes in leadership, and budget cuts would be taxing for any institution. EOU, however, has the added organizational stress of internal turbulence resulting in morale and trust issues. To some degree, these factors have created institutional paralysis—limiting the university’s capacity to respond to serious enrollment declines.

Negative press in recent months, a tenuous “town and gown” relationship, and strained relationships with area high schools along with state, regional, and local demographic trends (see charts on following pages) have created conditions in which enrollment growth of high school students will be difficult. To further complicate matters, Eastern Oregon University has a long history of benign neglect in terms of building a competitive enrollment infrastructure (e.g., staffing, resources, technology, and data analysis). Given pending budget cuts, it will be impossible to address these competitive deficits without reallocating existing resources—ceasing to support some existing initiatives and programs.

While there are undeniably daunting challenges facing the university, the consultant observed several positive indicators that, if leveraged properly, can help to overcome the aforementioned obstacles to enrollment success. First and foremost, there exists a compelling sense of urgency. Such urgency is necessary to compel an institution to engage in the massive change effort required at EOU. Secondly, the university possesses a core group of passionate employees who are willing to contribute time and expertise to the enrollment enterprise. Thirdly, you have institutional attributes that bode well for enrollment success (e.g., an attractive campus, small size, quality academic programs, no out-of-state tuition, adequate scholarship resources, and DDE courses and centers that provide convenient learning options for those who live and work in the university’s primary service area).



EOU Context

Oregon HS Graduates 2001-2017

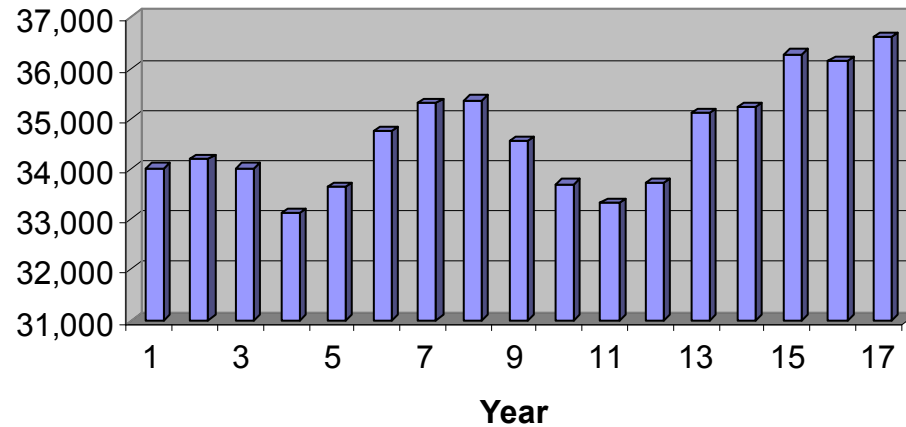


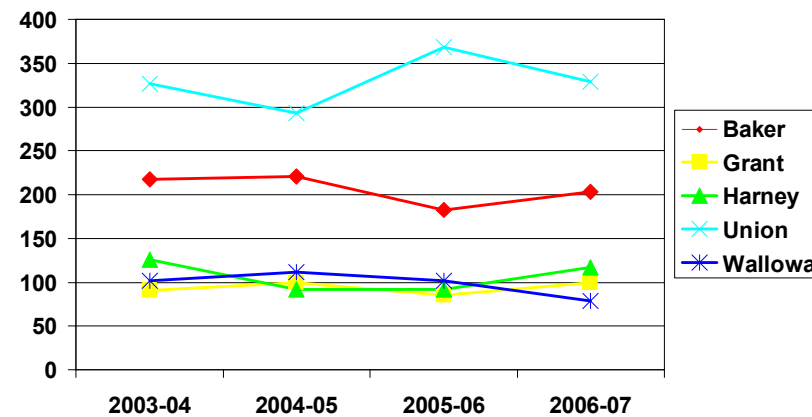
Chart 1: Oregon High School Graduates

Chart 1 shows the number of high school graduates in the state peaking in 2008 followed by a multiple year decline and a resurgence beginning in 2013.

Chart 2: Grade 12 Student Enrollment by County

Chart 2 reveals some change in the enrollment of high school seniors in counties served by EOU, but the cumulative total is fairly constant over this four-year period (863, 816, 829, and 827 from 2003-04 to 2006-07).

Grade 12 Students by County



NOTE: Malheur County data was unavailable.





EOU Context

One potential enrollment growth opportunity exists among adult learners. Typically, high unemployment like that depicted in the chart below and a depressed or stagnant economy compels adult learners to pursue higher education in greater numbers than in a robust economy.

A possible mitigating factor is the affordability of a university education. Some EOU personnel interviewed by the consultant expressed concern that fewer employers in the region will be providing employee reimbursement for education than in past years. This dynamic combined with the rising cost of higher education, rising transportation and fuel costs, as well as the rising cost of living may negatively impact adult learner enrollments at EOU.

Unemployment Rates June 2007

Baker County	5.5%
Grant County	6.5%
Harney County	7.2%
Malheur County	6.2%
Union County	4.8%
Wallowa County	4.7%
Oregon	5.1%
<i>seasonally adjusted</i>	5.1%

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Strategic Opportunities

Within this context, the university has opportunities to “sharpen the saw” (Covey, 1989). This report will highlight strategic opportunities in the areas of enrollment management. It is important to note, however, there have been numerous prior consultant findings, initiatives identified in the 2007 Strategic Enrollment Management Report, strategies described in the 2007-2010 Divisional Strategic Plans, and activities currently underway or planned within academic and administrative units that are valid alternatives to those recommended throughout the remainder of this report. An institutional focus on the recommendations in this report in combination with some of the aforementioned sources will allow the university to enhance and sustain its position in an increasingly competitive service region. You have no shortage of potential strategies. In fact, you have identified far more strategies than an institution of your size and resources can effectively implement. By thoughtfully selecting a manageable number of the strategies with the highest potential return on investment (ROI), Eastern Oregon University can fully leverage its efforts and have the capacity to execute well—which ultimately determines the success of any strategy.

The EOU strategic opportunities highlighted in this report include the following. To the degree possible, the consultant has incorporated strategies from the sources listed above that align with these strategic opportunities and have a high potential ROI.

- Institutional image
- Inquiry generation and cultivation
- Service delivery
- Student success
- Leveraging technology
- Data-driven decision-making



Institutional Image

For reasons that are painfully obvious to the campus community, EOU's image in area schools, the local community, and the surrounding region has become a serious liability as it relates to your capacity to enroll students. All the marketing and recruitment strategies you could possibly implement will not overcome a negative image. Hence, it is imperative that the university begin the long journey (three to five years) of repairing and defining your image. It is strongly recommended that the institution engage in a brand analysis and development initiative. **(MC)** SEM WORKS provides these services and would be pleased to provide a proposal or recommend other firms that you may want to consider. Regardless, of how you elect to proceed, we fervently believe this is a project that should be outsourced.

The concept of branding, as applied to higher education, is somewhat different from branding in the commercial sector. Most notably, branding in higher education is about who you are, not what a particular product offers to the marketplace. An educational brand is often equated to an institution's academic reputation. But, that explanation is far too limiting. Think of a university brand as being synonymous with the institution's personality—congruent with its mission, defined by its values.

An effective brand should create a unique institutional identity that will differentiate EOU from your competitors. If executed properly, EOU's brand strategy will ensure that the institution is "top of mind" among area students considering a graduate degree, a four-year degree, certificate, corporate training, or personal enrichment. More importantly, potential students and other key constituent groups will not just think of EOU generically, but they will have a clear and consistent image of the university—an image that can be defined by the audience with some specificity.



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Institutional Image

The brand message should reflect the essence of the brand in a way that captivates the target audience—leaving them with a longing to learn more. It also must be supported by evidence that adds credibility to the message and compels people to trust the messenger—in this case, Eastern Oregon University.

In the interim as a brand is being developed for the university, you are encouraged to retain the existing message, “live, learn, do,” or pursue a variation of the message proposed by the Integrated Marketing Committee, “Flex.” The risk with retaining the current message is two-fold: (1) it is a message that may be associated with the image you are seeking to change, and (2) it is a bland, non-distinctive message that is unlikely, by itself, to compel prospective students to enroll. There are several risks inherent in the proposed message as well. First, changing a message effectively requires substantial staff time and resources. How much of either are you willing to invest for a short-term solution? Second, many interviewed by the consultant, especially students and community members, do not view EOU as flexible. To the contrary, they view many aspects of the university as rigid and somewhat calcified. Consequently, the “Flex” message could actually backfire and become a message that lacks credibility. A safer and potentially more productive interim approach would be to adopt the message “Flex Your Mind” as you have done with a recently produced folder and certificate ads. This message should always be accompanied with a secondary message, “on campus, onsite, online.”

Prospective students will see this primary message as preparation for the next phase of their lives; alumni will reminisce over what the university did for them and take pride in what it is doing for others like them; donors will contribute to the potential of others or invest in the economic fuel (an EOU education) for the region; and legislators will simply see the EOU message as good for the constituents they serve and for the state. The secondary message reflects learning options, which are desirable to most students, and is malleable enough to be adapted to the needs of any student audience served by the university.



Institutional Image

The selected message should be the “drumbeat” that permeates everything you communicate to the outside world, and it must be accompanied by a body of evidence that supports your claim. **(MC)** This may include testimonials, student stories, third party validation, data sound bytes (e.g., employment rates, acceptance rates into graduate and professional schools, NSSE results, OSU data highlights), as well as institutional facts translated into student benefits and outcomes. Though university messages are rarely memorable or by themselves, compelling, the repetition of the supporting evidence does, over time, shape an institution’s image and can effectively influence enrollment behavior. Ideally, the evidence gathered and conveyed with the interim messages can be evolved and used with the new branding effort when it is rolled out.

Institutional selling points associated with “Flex Your Mind” and the related secondary message should be prominent in audience-appropriate communications. **(MC)** Recommended selling points include:

- Unique programs not offered by other educational providers in the service region
- Practical learning options
- Mind expanding learning options such as leadership and involvement opportunities, undergraduate research, internships, co-op, campus employment, and study abroad
- Preparation that improves job skills and job mobility
- Preparation for a career
- Preparation for graduate and professional schools
- Cost and academic quality = great value
- Convenience
- Small classes
- A caring environment
- A focus on student success



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Institutional Image

The selling points previously listed have little meaning or relevance to a student without some translation to a benefit that is relevant to them personally. Relevance is defined by the recipient of an EOU experience, not the institution. Often relevance is unique to an individual and thus, the articulation of the message and selling point should be customized whenever possible. However, for purposes of illustration here as well as practical application at EOU, the examples that follow are described for a particular segment of the institution's market.

Market Segment	Selling Point	Benefit
Adult learners	A caring environment	Someone will always be there to help you with questions, academic concerns, and practical matters associated with your education
Traditional freshmen	Academic programs that prepare students for a career and graduate or professional school	You have options . . . without looking any further; we will prepare you for a career or the next step in your educational journey
Online learners	Flexible, convenient learning options	You can conveniently get an EOU education from anywhere in eastern Oregon as well as the world
Corporate learners	Practical learning for real world opportunities	You can upgrade your skills and knowledge allowing you to improve your performance, increase your value to your company, and enhance your potential for job mobility

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Institutional Image

To successfully deliver selling points and audience benefits that influence enrollment behavior you must first understand prospective student needs and then determine how the university can best serve their needs or solve a problem they have (e.g., “I need a degree in rangeland ecology without leaving eastern Oregon.”). In the absence of specific individual information about needs, the university must make generalized assumptions about the needs of population segments (e.g., adult learners need convenient education options with minimal time to degree). Selling points (brand attributes) targeted at identified needs should be reflected in tailored communications. Said communications should be relevant to the recipient while effectively positioning and differentiating EOU from other educational alternatives the recipient may have.

Segmentation is the true power of marketing. It is the lever that moves people to action—to read your materials, visit your campus, apply for admission, enroll in classes. The magic of marketing is segmenting to an “n” of one with as little effort and expense as possible. EOU has several key segments to consider:

- First-time freshmen
- Transfers
- DDE students
- Extended campus students
- Graduate students
- Out-of-state students
- International students
- Continuing students
- Stop outs
- Workforce development students
- Students seeking personal enrichment
- Concurrently enrolled high school students
- Parents of high school students
- Employers

Each of these segments has different motivators and barriers for enrolling at EOU. Begin by identifying these motivators and barriers and then directly address them in communications to the target audiences. The most effective way to communicate motivators and barriers is through a clearly articulated, audience-specific value proposition. The value proposition should include: (1) a description of academic program benefits and outcomes, (2) a description of how, when, and where the university will meet their learning needs, and (3) a description of your value (quality plus cost).



Institutional Image

Much of EOU's current communication flow consists of letters, emails, and phone calls. While the written communications are well-written, they lack the visual appeal that can be found in publications. The existing arsenal of recruitment-oriented publications is inadequate to implement a robust communications plan like the one recommended later in this report. Specifically, the following new and repurposed publications and collateral materials are recommended **(E)**:

- A revised high school search piece designed to engender interest in the university and compel the reader to complete and return an inquiry card expressing interest. The piece should be highly visual, text light, and benefits oriented.
- A general information poster with affixed inquiry cards for distribution in high schools, businesses, agencies, and high traffic areas in the community.
- Invitations for information sessions and open houses to promote attendance at these events and provide a reservation mechanism.
- Three viewbooks tailored to the specific interests and needs of target audiences: high school seniors, transfers, and DDE students. The viewbooks should serve as the fulfillment piece for initial inquiries and should include or be accompanied with an application for admission. The DDE publication should shift from a daunting multi-step process brochure to a marketing-oriented sales piece.
- Utilization of the existing junior brochure (Your Guide to Choosing a College) designed to be the fulfillment piece for inquiries from high school juniors and younger students. Like the search brochure, this publication should be highly visual and text light. In addition to EOU selling points, the brochure should include useful college planning information and entice the recipient to visit the campus.
- Print-on-demand academic brochures conveying distinctive program features, faculty expertise, student accomplishments, alumni and employer testimonials, etc.
- A parents brochure designed to address the issues of most interest to the parents of prospective high school students, namely affordability, safety, the marketability of EOU degrees, job placement rates, acceptance rates to graduate and professional schools, and the quality of the educational experience, including living conditions.



Institutional Image

- A graduate brochure describing the graduate student experience at EOU, availability of assistantships and scholarships, opportunities to engage in research, living options for graduate students, etc.
- A postcard series for high school juniors and younger students designed to keep the name of the university in front of them as they create a list of institutions to consider, shape the perception they have of EOU, position the university as a valid alternative to other four-year universities, emphasize the value of EOU (low cost, high quality), and cultivate their interest in EOU so that they will want to apply for admissions once they become high school seniors.
- A postcard series for adult students designed to overcome their natural fears of returning to college. This can best be accomplished by featuring adult student success stories (one feature student per postcard).
- A “it’s not too late to register” postcard designed to compel applicants who have not registered to do so before the deadline.
- A common publication at many institutions, an “Enrollment Handbook” is designed to package in one piece everything a student needs to complete the enrollment process (e.g., steps to enrolling, a recommended timeline to follow, and necessary forms such as housing, immunization, and orientation reservation). There should be a separate Enrollment Handbook for DDE students and graduate students.
- Reinststitute the printed schedule of courses. This is a vital marketing tool for the centers and is valued by adult learners in particular.

Some general recommendations for improving existing publications include:

- Focus less on facts and more on benefits and outcomes.
- Use more audience segmentation.
- Ensure that publication distribution across the university is coordinated in terms of message, design, sequencing, and timing.
- Avoid delays in publication production and delivery by using a publications project plan like the one in Appendix A. The Admissions Operations Calendar provides due dates for existing publications and thus, is it starting point for project management.

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Institutional Image

Regardless of age, gender, ethnicity, socio-economic status, geographic origin, or educational objective, prospective students typically begin their college search on the Web. While the existing EOU Web site provides a solid foundation, it is not an effective marketing tool designed to capture the interest and imagination of site visitors. Many of the goals, objectives, and concepts presented in an untitled EOU Admissions Web development document are on target and should be implemented at the earliest possible time. **(MC)** In particular, the design objectives that are paramount to a successful prospective student Web site:

- To captivate prospective students
- To develop a creative, flexible, and fun Web environment
- To ensure content is broad-based, informative, and frequently updated
- To design the site with the intent to maximize conversion of prospective students into matriculated ones

Web development is an organic process, and as such, there are opportunities to restructure the site so that it is more of a recruitment and marketing tool; ensure guidelines for consistent content, design elements, and navigation are adopted university-wide; maintain and enhance the site are possible by increasing staffing capacity; and purchase a robust content management system to aid with all of the aforementioned. Also, consider the following immediate opportunities for improvement: **(E)**

Homepage

- With the exception of the A-Z sitemap, directories, Webster, campus services, and registrar, the items listed in the top row navigation are not useful to prospective students and should appear only on current student and faculty/staff pages. The registrar link is counterintuitive in that most viewers will expect to be sent to a registration log-in, not the Registrar's Office homepage.



Institutional Image

Homepage (continued)

- The second row top navigation is appropriately labeled with audience segments. Under the prospective student tab, no further segmentation is visible without mousing over “Admissions for.” Segmentation options should be accessible from the homepage by mousing over or clicking prospective students. This segmentation should include most if not all of the segments referred to earlier in this report. DDE, for example, is noticeably absent from the list of choices. Audience segmentation is designed (1) to take visitors down a path of relevance without surfing the entire site, (2) marketing to them with tailored selling points, and (3) providing audience-specific steps to enrollment and calls to action.
- On the right side navigation, the search box and most of the available links are intuitive and useful. The questionable item is “Partners Program,” which appears to have a limited audience and thus may be more effectively placed elsewhere on the site. Also, the vast majority of Web sites display navigational links on the left, not the right. Moving these items to the left should increase user comfort.
- The “News” items in the body copy are of minimal interest to the external world and should be under the News and Events link. Replace this copy with engaging multimedia options or something like “The Ten Reasons to Enroll at EOU.”
- Under “Focus”, the item about improving enrollment sends the wrong message. It suggests you have an enrollment problem. While this may be true, promoting this fact will only create doubt in the minds of potential students and their families.
- The missing element of the homepage is the opportunity for prospective students to “request information.” A link to an inquiry form should be highly visible on this page as well as all subsequent prospective student pages.



Institutional Image

There are three secondary pages that are visited by many prospective students and thus, deserve your immediate and ongoing attention. Recommendations for the three pages follow:

Admissions

- Move “request information” from the side navigation to the list of options at the top of the page.
- Provide an online application option.
- Add a visual pictorial of the campus (virtual tour or photo gallery).
- Add selling points in place of the out-of-date “Important Dates” copy.
- Add student success stories and testimonials.

DDE

- Cease using the acronym DDE. It is known by internal audiences, not first-time site visitors.
- Label DEEzine something more intuitive.
- Consider including further audience segmentation for purposes of providing tailored selling points and relevant information pathways.
- Replace body copy with selling points, student success stories and testimonials, employer testimonials, and multimedia designed to expose students to learning options.

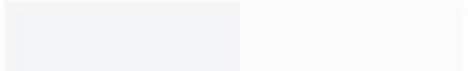
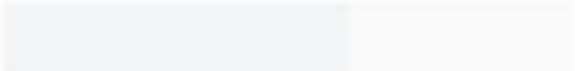
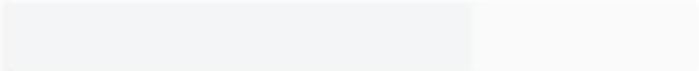
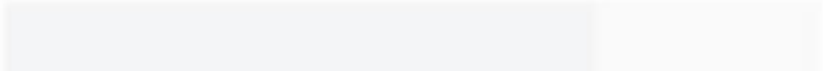
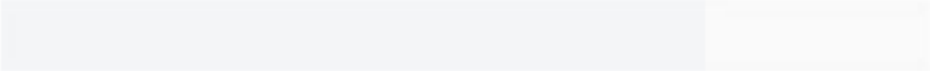
Financial Aid

- Replace “what happens to your aid when you drop your class” with useful tools (e.g., financial aid estimator, loan repayment calculator, check your aid status, Web chat with a financial aid counselor), how-to steps, and information about available aid options.
- Bring the “apply for aid” link to the top level of the page with high visibility.
- Promote the service of one-on-one assistance completing the FAFSA. Provide a mechanism by which students can schedule an appointment for this service.
- Promote financial aid workshops.
- Sell your value proposition on this page (e.g., low cost, return on investment).



Institutional Image

Finally, it is important to note that image enhancement is a long-term, resource intensive enterprise. To be successful in recasting the institution's image and market position, you must view institutional image as one of your most precious assets. It must be protected. It must be nurtured. And, marketing investments far beyond those historically made by EOU must become annualized. In particular, investments in the publications recommended in this report, a Web site redesign along with related infrastructure and staffing, as well as advertising dollars for general awareness campaigns, DDE, and regional centers are imperative.





Inquiry Generation and Cultivation

EOU needs to expand its inquiry pool with prospects who have a moderate to high probability of enrolling at the university in order to generate enough applications to increase enrollments. When institutions, like EOU, experience enrollment declines and have a limited market size, there is a tendency to expand to new markets. Resist this temptation. The consultant firmly believes there is untapped potential in your primary market and to a lesser degree, in your secondary market. So, focus first on pursuing maximum penetration in your primary market (the twelve counties you have traditionally served) and raising awareness and increasing influence in your secondary markets (the rest of Oregon, contiguous states, Alaska, and select countries such as China and Mexico). **(E)** To generate quality inquiries from these markets, it recommended that the university:

- Purchase PSAT names of high school sophomores and juniors for all six test administrations. Names should include students who mirror the academic profile of EOU enrolled students (e.g., PSAT score ranges, self-reported high school grades), attend school in the service region or secondary markets, and indicate an intended major offered by the university. Mail a search piece, a tailored letter for each segment, and a business reply card or form. Regarding the latter, the sample provided to the consultant did not include such a response mechanism. However, a form, "Tell us more about you!", is included in an earlier mailing. Without an easy inquiry response mechanism accompanying the search piece, the response rate will be minimal. The search should be preceded by an email campaign with a link to an online inquiry form and followed four weeks after the mailing with an email to all non-responders giving them another opportunity to inquire.
- Purchase names from the National Research Center for College and University Admissions (NRCCUA) using the parameters described for PSAT names. Ensure NRCCUA does not sell the university duplicate names. Follow the same communications process outlined above.
- Use geodemography to develop prospect lists of potential credit and non-credit, adult learners. Send them teaser postcards inviting them to information sessions and providing a mechanism to request a printed schedule of courses.
- Develop "point of sale" posters with attached inquiry cards for dissemination to local high schools, businesses, community agencies, and high traffic areas in the community.
- Generate Internet leads through search engine optimization, placing a prominent link on the homepage and the prospective student pages of the EOU Web site to "request information," explore "pay per click" options with the major search engine providers such as Google and Yahoo!, and consider ads on high school, community college, chamber of commerce Web sites.



Inquiry Generation and Cultivation

According to the 2007-08 Inquiry Student Communication Plan, there is no response to initial inquiries. It is recommended that you send them a tailored acknowledgement of interest letter with an audience-appropriate viewbook and an application for admission. Other communications do occur with prospects prior to receiving their application for admission, but most of these communications are letters, emails, calls, and Web chats, not publications. The Admissions Office has plans for multiple communications with high school prospects, transfers, and international students, but further segmentation is desirable. A detailed communications plan is described in Appendix B. **(MC)**

Inquiry response time: The time between the student's initial expression of interest in the university and receipt of the first communication can be anywhere from one week to five weeks depending on the volume of inquiries. Work toward a forty-eight hour turnaround. **(MC)** Speed of response must become a strategic priority. There are many potential strategies to improve turnaround (e.g., hiring additional staff during peak periods, scanning and indexing inquiry cards, driving inquiry traffic to an online form, having recruiters enter prospects into an online inquiry form while on recruitment trips, using digital pens at fairs, so that data can automatically be uploaded without data entry). Pursue one or more of these options.

Multichannel communication: EOU should deliver communications through multiple mediums and multiple authors. **(MC)**

- Leverage the technology you already own to send e-mail campaigns, conduct phoning campaigns, create a robust prospective student portal, automate customized mail communications, etc.
- Ensure communications are from people who will have the most influence over the recipient's college decision. For EOU, desirable authors include the president, faculty, academic deans and department heads, the director of admissions, the director of financial aid, alumni, and select EOU students.



Inquiry Generation and Cultivation

Communications Approach:

1. Ensure all communications exhibit the following characteristics: **(E)**
 - A clear written objective
 - A compelling “call to action”
 - An effectiveness measure
 - A clearly identified target audience
 - A tailored message designed to address target audience motivators and barriers to enrolling
 - Consistency with the “Flex Your Mind” message
 - Evidence to support the promises inherent in the message
 - A focus on student benefits and outcomes
2. Where possible, communications should be tailored to a specific audience rather than generic. **(E)**
3. Utilize mass customization tools so that communications appear to be designed for each individual (e.g., e-mail campaigns, digital publications, portals). **(E)**
4. Engage in relationship marketing, which refers to establishing and cultivating relationships with prospective students with the first point of contact through enrollment. This can best be accomplished by building on existing outreach activities, counselor follow-up, and personalized service provided by the staff with a robust communications plan (see Appendix B) using multiple touch points throughout the recruitment process. **(MC)**
5. Marketing to the influencers is admittedly difficult for the population served by EOU. That said, you may start by focusing on the top influencers of high school students (parents) and adults (employers). **(D)**



Inquiry Generation and Cultivation

Campus visit: Campus visits should be your most productive yield activity. Decisions in the college selection process are based primarily on emotion. Positively or negatively, no other pre-enrollment experience will evoke more feelings about the university than the campus visit. It is a “moment of truth” you cannot afford to fail.

For this reason, it is recommended that you reengineer the EOU campus visit experience. **(MC)** You need to create an experience for visitors that conveys the promise inherent in your marketing message. The experience must make visitors feel welcomed, like EOU is the right place to begin or continue their university education and that the institution fosters student success in every dimension of the campus. To engender this emotion, EOU needs to:

- Ensure visitors follow directions to campus and enter the campus on a path that presents the best image of the institution and the surrounding community.
- Improve the clarity of campus signage, particularly for the Admissions Office.
- Provide free visitor parking adjacent to the front entrance of the Inlow building and cease the practice of requiring visitors to travel across campus to obtain a visitor’s parking permit.
- Provide drinks for visitors.
- Create a multimedia presentation designed to showcase student success stories that will inspire the viewers and allow them to envision themselves at EOU. Secure an attractive presentation room for this purpose.
- Continue in the direction of carefully selecting and training Student Ambassadors. Students should be well trained in the art of giving tours and how to convey their own experiences at EOU that reinforce the message that the university is passionate about expanding minds.



Inquiry Generation and Cultivation

Admitted student yield: The yield rate of admitted students at EOU is reasonably high. However, there still exists opportunities for improvement. The following are recommended actions designed to improve efficiency and yield: **(E)**

- Provide prospective students with access to Webster with the acknowledgment of receipt of their application for admission. Said access will allow them to check the status of their application without contacting the Admissions Office.
- Continue the existing practice of multiple requests for missing information, including follow-up counselor calls.
- Mail invitations to visit the campus and attend open house events.
- Contact students to arrange an advisor appointment.
- Mail the schedule of courses to admitted students.
- Have current students call prospective students who possess a similar profile (e.g., traditional students, adult learners, online learners) to influence their decision to enroll.
- Have faculty call students who have been admitted to their academic programs to discuss the “selling points” of the program and make a personal connection.
- Have parents of current students (ideally the parents of Student Ambassadors) contact the parents of prospective students to reassure them that EOU is an excellent choice for their son or daughter by sharing their own experiences with the university.
- Have alumni send congratulatory admissions letters on their company stationery, host receptions for admitted students in their homes, and present scholarship awards at high school award days in their community.
- Host an admitted student open house that provides an opportunity for attendees to register for classes early.
- Require participation in orientation for all first-time freshmen.



Inquiry Generation and Cultivation

Scholarship Program:

Without conducting a comprehensive scholarship/yield analysis, the best advice the consultant can provide is based on general parameters that have been successful at other institutions with whom he has worked. With that caveat, it is recommended that EOU redeploy existing scholarship dollars allocated for general merit (where possible given statements of establishment), valedictorian and salutatorian merit, and departmental allocations in order to offer the following scholarships:

- A Presidential Scholarship with \$500–\$1,000 awards should be created for admitted students who score between 1000 and 1250 on the SAT (this range excludes the writing score), have a 3.0 or better high school grade point average (GPA), and are not eligible for other academic scholarships. More precisely, \$500 awards should be given to qualified students with SAT scores between 1000 and 1149 and \$1,000 awards to those in the 1150 to 1250 range. In addition, these students should be required to live in the residence halls for the duration of the scholarship. The scholarship would be renewable for up to eight semesters if the recipient earns a 3.0 or higher semester GPA.
- Offer an Academic Excellence Scholarship to potential transfers with at least 45 hours of college credit and a cumulative grade point average of 3.0 or higher. Send this offer to every qualified prospect who has inquired or applied to EOU, sent transcripts, is identified on a list of future graduates by your two-year feeder schools, or is listed by Phi Theta Kappa. The scholarship would be automatic and guaranteed as long as the student is admitted to EOU and enters with at least a 3.0. The Academic Excellence Scholarship would be valued at \$500 annually plus a 25% discount on housing and would be renewable for up to four semesters if the recipient earned a 3.0 or higher semester GPA.

The proposed scholarships are targeted at students who are unlikely to receive scholarship offers from other institutions and are likely to be influenced by a relatively small scholarship offer. No scholarship application should be required for these awards. The awards should be automatic and sent to the student as early in the decision-making process as possible to ensure maximum impact. Within these populations, you may want to identify a subset of the population using the Noel-Levitz predictive modeling tool. If you elect to further qualify potential recipients, target those who may enroll if enticed to do so. Qualifying will eliminate the power of actively marketing these scholarships with a “guarantee” but will give the university greater control over the total amount awarded.



Service Delivery

Every day Eastern Oregon University has hundreds of “moments of truth”—encounters with those you serve (Carlson, 1987). The capacity to manage “moments of truth” determines, to a large extent, an organization's image and success with its customers. No organization can afford to disenfranchise its primary customers. Failure to effectively manage “moments of truth” often leads to the dissatisfaction and even the premature departure of EOU students.

To successfully manage “moments of truth,” the university must focus on the three foundational elements of service delivery: your people, your processes, and technology as a mechanism to deliver services anytime, anywhere. Put another way, the university should adopt a service philosophy that blends high tech with high touch services.

Existing service gaps identified by the consultants include:

- Students serve as the primary receptionists for incoming calls to the university. This model yields the dissemination of inaccurate information, an extensive number of transferred calls, and less than a favorable impression of the university.
- Student runaround between administrative offices as well as between administrative offices and academic units.
- Insufficient communications and coordination between administrative offices and regional centers.
- The absence of needed classes results in campus students taking DDE courses by default rather than because of personal preference.
- Last minute policy changes cause confusion and give prospective and current students the impression that the campus is organized.



Service Delivery

- Students are not deregistered from courses due to non-payment, and this prevents students who would like to enroll in these courses from having the opportunity to do so.
- A late billing cycle eliminates the possibility of deregistering students in time to open courses to students who would like to enroll in courses that appear to be full but are not. Late billing also delays student commitment and thus, increases the likelihood of “last minute” student attrition.
- Late pre-registration increases the likelihood that continuing EOU students will not return in the subsequent term and limits the institution’s capacity to respond to unexpected shifts in enrollment patterns.
- The current turnaround time of transfer equivalencies is so late that it has minimal impact on the enrollment decisions of potential transfers. Appendix C represents a model in place in the business department at EOU, which may serve as a temporary solution until the ATLAS project is complete.
- Delays in the confirmation of EOU undergraduate degree completion is an impediment to graduate student enrollment.
- There is minimal cross-training occurring within administrative units and none between departments. This exacerbates EOU’s “depth on the bench” staffing issues and ensures that there is little knowledge of policies and procedures between offices—often resulting in miscommunication and student runaround.
- There are no “student hand-off” protocols for moving students effectively between offices.
- There is high employee turnover in some areas, which leads to knowledge and experience gaps.
- There are limited university forms available on the Web. All forms should be accessible from the Web in a format that can be submitted electronically.
- The university does not have a one-stop model where students can go to one location to receive information, transact business with the institution, and resolve problems.
- Similarly, there is not a single Web page (a no-stop) where students can access critical information, complete enrollment processes, retrieve forms, and interact online with staff who can assist them.



Service Delivery

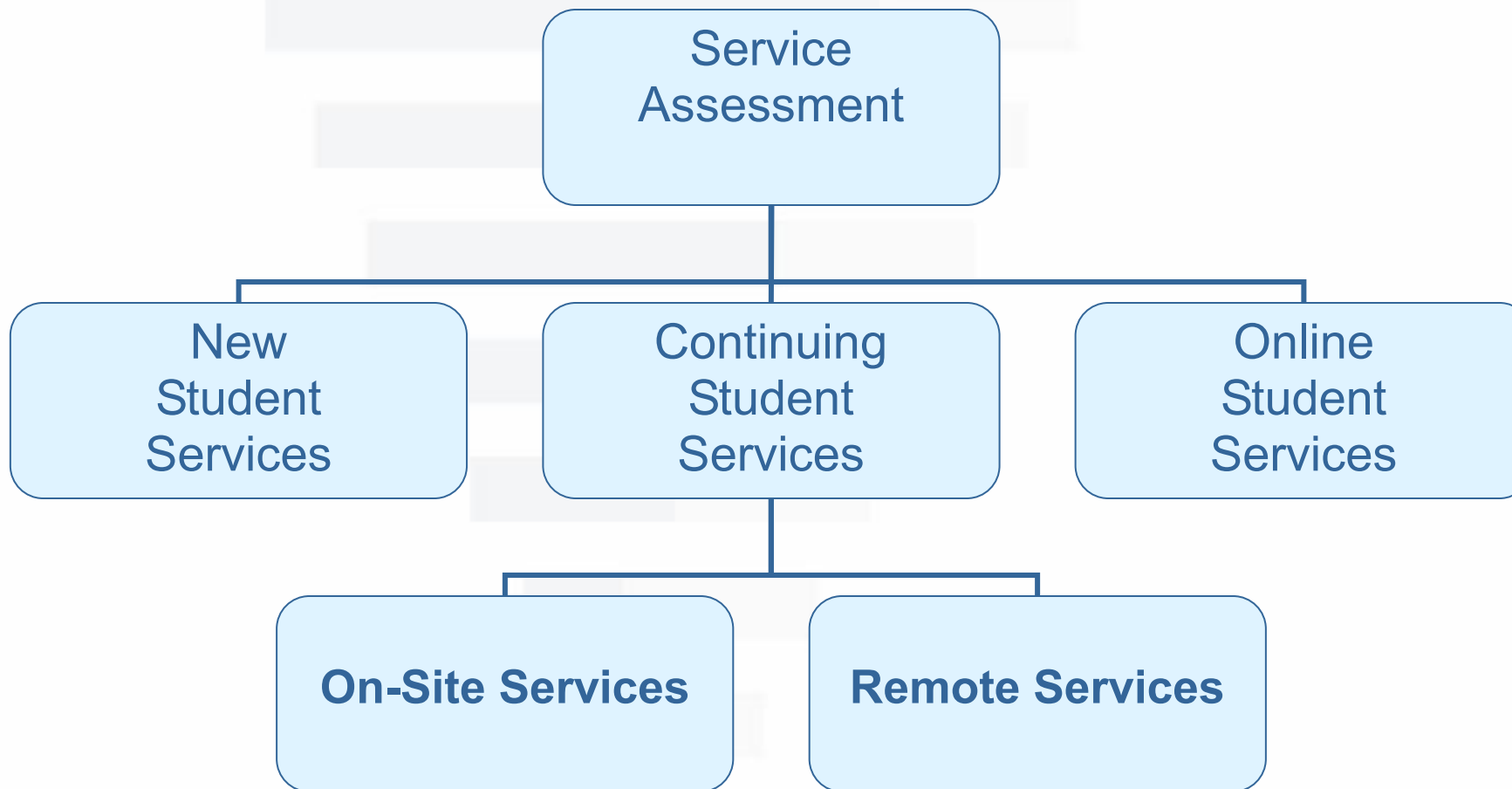
- There is no clearly articulated university service philosophy.
- EOU needs to embrace student-centered attitudes and practices. Personnel who do not subscribe to and contribute to the student-centered mantra should be held accountable.
- EOU needs to offer comparable services to online learners and regional center students that it provides to on-campus students (e.g., counseling, financial aid assistance, academic support services).
- Some faculty are not responsive to DDE students—particularly as it relates to the timeliness of course-related communications.
- There is a proliferation of proctored exams that often results in inconvenience and additional cost to students.

All of the aforementioned service gaps, along with the issues identified in the recent customer service audit conducted by the Training and Employment Consortium, should be addressed by related administrative units when the gaps are contained within a single office or by a university-wide team of student service providers when the gap spans multiple departments. Assigned administrative offices should provide senior management with a detailed plan and timeline for addressing service gaps. The team should be given the charge and corresponding authority to work with the senior management team in resolving identified interdepartmental gaps. Progress and impediments to progress should be reported to senior management on a routine basis. **(MC)**



Service Delivery

The model illustrated below is recommended for EOU because it suggests that assessment be infused throughout all service delivery. It also implies services for new, continuing, and online students need to be comparable yet different enough to recognize the unique needs of each population. Finally, the model suggests that each population will need some combination of on-site and remotely delivered services.





Student Success

- All of the students at EOU are coming to the institution with some level of risk. Risk may be academic in nature or may take other forms such as financial, personal, health, social, etc. Consequently, all EOU students should be targeted for various interventions that are appropriate given their backgrounds and circumstances. Unfortunately, the institution does not have adequate data on attrition causation to be more strategic with the allocation of time and resources dedicated to improving student success. It is recommended that you begin the process of collecting and analyzing data to determine which student are at risk as well as what are the high risk experiences at EOU. **(E)**

Regarding the latter, you can make some assumptions based on national research about high risk experiences that can position even your best students for failure. Student success will improve if the right conditions for success are in place. The following conditions for success are recommended for EOU:

- Ensure adequate on-campus courses are available to meet student demand, so that individuals who are inadequately equipped to succeed in online courses are not taking said courses because they have no other option.
- Protect student schedules from multiple high risk courses—classes with high percentages of D, F, W grades.
- Ensure students are always provided with accurate and timely information, particularly about degree requirements and progress towards their degree.
- Continue to follow-up with “no shows.”
- Review institutional policies and procedures on a regular basis to ensure they add value to the student’s experience and are administered fairly and uniformly.
- Provide advising contact, particularly in the first semester of enrollment.



Student Success

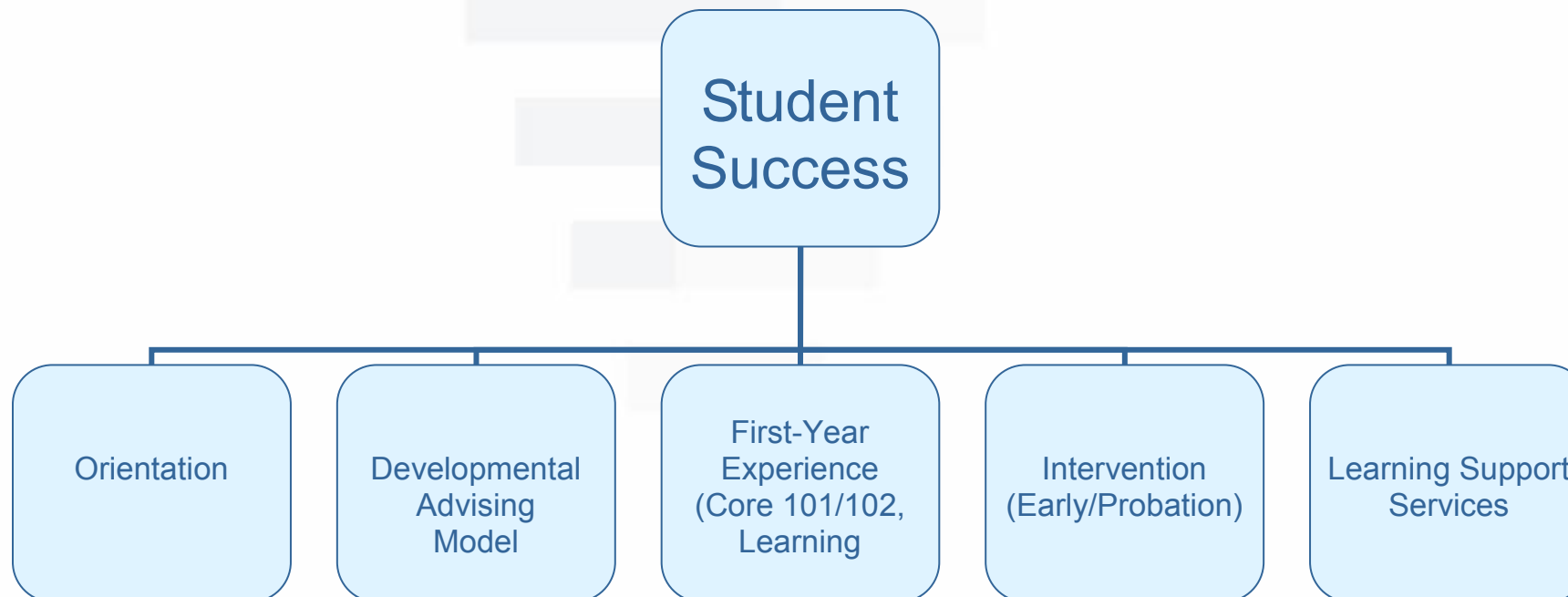
Advising should be the centerpiece of the student success initiative. The existing advising model is a combination of professional advisors in each college and in DDE as well as faculty advisors on campus and at regional centers. Of these components of the existing model only the faculty advising for on-campus students appears to need significant improvement. As is common with many faculty advising models. EOU has pockets of exemplary faculty advising where mentoring occurs; many advisor/advisee relationships that occur once per term (if then) for scheduling purposes; and some advising scenarios where advisors are inaccessible, ill-prepared, or provide inaccurate information. The university should foster a pervasively high-quality faculty advising model by: **(E)**

- Determining which students need advising and program Webster, so that identified students cannot register without their advisors approval.
- Selecting faculty advisors who are inclined to engage in mentoring and will provide students with guidance regarding career, educational, and life goals.
- Training all faculty advisors with a common training curriculum and specialized training in their academic area.
- Evaluating the quality of advising much like you assess the quality of instruction.
- Rewarding exemplary advising in the tenure and promotion process as an element of good teaching.
- Resisting the temptation to assign good advisors more advisees. Keep advising loads manageable.
- Providing advisors with the tools they need to appropriately advise students (e.g., access to placement test scores, academic records, degree audits, policy changes).



Student Success

In addition to the aforementioned advising recommendations, the university has an opportunity to improve student success by providing mentoring to entering students prior to enrollment, during orientation, and throughout the first year. The illustration below suggests a model for providing new student mentoring. In the proposed model, the university would supplement existing Core 101 instructors with a cadre of adjuncts. These individuals would be responsible for (1) conducting outreach mentoring calls to admitted students beginning the process of exploring career, educational and life goals and matching identified goals to course offerings; (2) serving as the advisor of record during orientation; (3) teaching one Core 100 course to their mentees (required of all new freshmen); (4) engaging in early intervention on behalf of their students—including recommendations for usage of learning support services; (5) serving as instructors for Core 102 (offered on a voluntary basis); and (6) mentoring a group of students who are on probation following the first semester. Participation in the latter would be required for continued enrollment and would include an assessment of causation, an individual learning plan, and required meetings with the probation mentor.





Leveraging Technology

In addition to leveraging people and processes, EOU has opportunities to enhance productivity by leveraging technology. The following are recommended:

- Determine the strategy the university wants to deploy and then identify the needed technology solution. **(D)**
- Optimize the Banner system by investing in ongoing staff training, developing a modest level of technical expertise among functional staff, ensuring that functional units are aware of Banner functionality and emerging features, and determine if “bolt-on” solutions are needed to accomplish institutional objectives. **(D)**
- Proceed as quickly as possible with implementation of the ATLAS project or the Banner transfer equivalency module. **(E)**
- The university needs to complete the implementation of CAPP, the degree audit module of Banner, and use it as the primary advising tool. Ideally, students should be prompted via e-mail to visit their Webster account to view a customized listing of course options that are based on unmet degree requirements and space availability. **(E)**
- Document imaging is essential to providing necessary information to advisors and regional center personnel. Consider purchasing Banner Extender or Nolij along with the necessary hardware (e.g., high-speed scanners, desktop scanners, large monitors). **(E)**
- Prior to implementing portal technology ensure the necessary infrastructure to leverage the technology is in place. You will need dedicated people to promote awareness and use of the portal, to harvest and repurpose content keeping the portal fresh, to create features that encourage student engagement and create community through social networks, and to develop robust communications tools. The aforementioned should be guided by a marketing and enrollment strategy with identified outcomes (e.g., enhance yield from application to registration, improve student success, create student loyalty). **(D)**



Leveraging Technology

- Pursue the creation of a single log-in and password for all systems at the university. It is recommended that you use your LDAP directory and Kerberos security to accomplish this objective. **(D)**
- Require students to use their EOU email account to retrieve critical information and hold them accountable for doing so. Email must become the primary source for communicating with students with guidelines for appropriate usage. Do not allow students to forward EOU email to a third party email client such as AOL or Hotmail. **(E)**
- Utilize Blackboard as a supplementary tool for conveying critical information to students. **(D)**
- Expand the number of online courses and programs by investing in the infrastructure to produce online courses. Create a team, sometimes referred to as the spider model, that works with faculty as the content providers. Such a team should include instructional designers, Web developers, graphic designers, multimedia specialists, and people providing technical support to faculty and students. **(MC)**
- Explore the acquisition of classroom management software to ensure optimal use of university classroom space. **(D)**
- Fully utilize the predictive modeling software the university licenses for differentiating communications to prospective students as outlined in Appendix B and possibly for predicting the probability of student success. **(D)**
- Purchase or develop in-house knowledge management capabilities, so that service providers have just-in-time access to information, enrollment process steps, campus resource personnel, etc. in order to effectively manage institutional “moments of truth” with 100% accuracy. **(MC)**
- Create a university administrative systems team to prioritize related IT projects, so that institutional strategic objectives are met. **(E)**



Data-driven Decision-making

As illustrated during the consultant briefing session, there are many methods and tools for using data to effectively measure and drive strategy. However, there are several elements that must be present in order to achieve and sustain competitive advantage. The university is encouraged to engage in the following data practices: **(MC)**

- Assign ownership of data integrity to the Office of Institutional Research. That said, data integrity is everyone's responsibility. Common data definitions and coding structures must be universally adhered to if the data is to have meaning and be reliable. The audit feature of Banner should be used to identify data problems and provide intervention to employees where necessary.
- Identify key performance indicators (KPIs), sometimes called critical success factors, to measure the impact of strategies on high-level institutional enrollment objectives. No more than seven to ten KPIs should be identified.
- More granular metrics should be defined for each KPI.
- Strategies should be linked to one or more metrics.
- Effectiveness measures (see Appendix B for examples) should be identified for each strategy—including return on investment (ROI) measures.
- An enrollment analyst position should be created and assigned the responsibility of tracking and reporting findings for KPIs, metrics, and effectiveness measures. This position also should be responsible for forecasting enrollments and providing predictions for senior management as well as academic deans and department chairs.

NOTE: Examples were provided during the consulting briefing for each of the aforementioned data elements.



Antecedents to Success

Regardless of the report recommendations selected by senior management for implementation, it is imperative that the institution develop the infrastructure necessary for successful execution of selected strategies. Moreover, visible leadership support is essential to make a symbolic statement to the university community of the importance of enrollment efforts. Important antecedents to success include:

- A clearly articulated enrollment plan with enrollment targets based on data projections and environmental factors.
- Actionable intelligence—meaning data that is easily accessible, analyzed, and used to inform institutional actions.
- Strategic staffing increases as outlined in the report.
- Long-term, adequate resources to execute the recommendations in this report, and short-term, seed money to begin initiatives that will have an impact on 2008 enrollments.
- Technology optimization.
- The launch of an internal communications campaign designed to raise awareness and seek campus-wide buy-in.
- A sustainable direction without intervening institutional ambitions or panic-driven responses to fluctuations in enrollment. Create a solid plan, and stay the course.
- A continued investment in human capital.
- An organizational structure that positions EOU for success and is designed to improve enrollment outcomes.



Final Thoughts

In the Jim Collins' book, *Good to Great*, the author describes a common phenomenon among companies that is equally as prevalent among colleges and universities. Collins calls it "the flywheel"—the belief that one dramatic strategy or effort transforms an organization from good to great. You are discouraged from searching for the "quick fix" that will propel EOU to a new market position or garner increased enrollments. Unfortunately, there is no single defining action or strategy significant enough to turn the giant flywheel—to yield dramatic results that are sustainable over time.

It will be the cumulative effect of your efforts that will pave the path to success. It will not be the strategies per se that will get you there but rather your ability to execute better than your competitors. Indeed, every strategy currently in place at EOU or recommended in this report can be replicated. There is no sustainable competitive advantage in a strategy. EOU will ultimately be successful in achieving its bold aspirations by fostering a singular focus on improving the capacity to execute.

That capacity is your people. An investment of time and resources in staff learning can be correlated directly to high-performing enrollment organizations. Be intentional about the development of human capital as well as the motivation of your employees. The flywheel will turn if everyone is pushing in the same direction with equal vigor.