Engage Them to Keep Them

Using Proactive Outreach to Increase Enrollment & Retention
Enrollment = Admission and Retention
The administrative and regulatory process creates hurdles that must be cleared before the student can continue through the process, register and receive financial aid.

• Federal
• State
• Institutional
• Program
The process can be confusing to students who are first generation and/or non-traditional students

- Admission application
- Transcript request/submission
- FAFSA application
- State aid application
- Promise application/requirements
- Financial aid verification requirements
- Satisfactory academic progress
- Developmental testing requirements
Students can stumble at any point along the way

- Slow completion of the requirements
- Failure to enroll
- Elect to attend another institution
- Failure to complete the program
Solution: Engage Them to Get Them and Keep Them

Deploy strategic proactive outreach campaigns at critical points in the student lifecycle

• Targeted counseling to move them through the process
• Identify individual issues that may impede the student
• Discover choke points in the process
  – Admissions
  – Registration
  – Financial aid
  – Advising
Best Practice: Targeted Approach

Situation-specific outreach campaigns allow colleges to:

• Convey college support for students – you care
• Control message that subsets of students receive
• Schedule delivery and timing
• Manage inbound inquires – staff resources
• Gather data from students
Engage Them to Get Them and Keep Them

Benefits

• Increased enrollment
• Increased completion of requirements
• Increased retention
• Leverage data obtained to change/refine processes
Engage Them to Get Them and Keep Them

Challenge – Resource Allocation

• Staffing - calling hundreds or thousands of students can be time consuming and costly if only relying on internal staff
• Training - college may lack training resources needed to train year round
• Technology - telephony technology and bandwidth for effective outbound call management may be costly
Engage Them to Get Them and Keep Them

Evaluate Success

Monitor key performance indicators to evaluate the success of each individual campaign and the long term success of the overall strategy.

• # students who enrolled
• # students who re-enrolled
• Total tuition/fee revenue generated
• Information gained from student survey data
• Impact of process improvement findings
Engage Them to Get Them and Keep Them Case Studies

Case Study Discussion

• Admission Campaign
• Retention Campaign
• Financial Aid Verification Completion
Case Study

Texas State Technical College
Case Study TSTC

About TSTC

• 10 campuses – largest located in Waco and Harlingen
• Statewide mission
• Focus on technical-vocational programs
• Chancellor – Mike Reeser
• 13,249 students
Case Study: TSTC

Background

In 2013 inbound calls and financial aid verification for TSTC were outsourced to Edfinancial.

Results

• Process improvement for FAO and Admission
• Elimination of need for staff overtime/comp time
• Better overall call management
Registration Campaign 911 – launched Dec 2015

• 2,300 warm leads – returning students for Spring 2016
• Edfinancial launched “just in time” campaign
• Students had 10 days remaining to register including late registration

Measuring for Success

• 370 enrolled
• Revenue generated - $600,000 in tuition/fees
• Based on success, school decided to focus on Fall 2016 – new students
TSTC Case Study – Proactive Outreach

- Longer term campaign launched in Spring 2016
- 7,000 new students
- Target enrollment period – Fall 2016
- Live counselors and voice mail – 63% contact rate

<table>
<thead>
<tr>
<th>Call Status</th>
<th>% Registered for Fall Courses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested a callback from Admissions</td>
<td>30%</td>
</tr>
<tr>
<td>Requested a callback from Advisement</td>
<td>39%</td>
</tr>
<tr>
<td>Already planning to attend/no call back needed</td>
<td>37%</td>
</tr>
<tr>
<td>Requested a callback from Financial Aid/ Student Accounting</td>
<td>33%</td>
</tr>
</tbody>
</table>
TSTC Case Study – Proactive Outreach

Tuition/fee revenue – $3.4 million

Campaign Conversion Rate

- 26%

Final Certified Enrollment

<table>
<thead>
<tr>
<th>Students</th>
<th>Fall 2015</th>
<th>Fall 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacts</td>
<td>10,709</td>
<td>12,557</td>
</tr>
<tr>
<td>Enrolled</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

15% increase
Case Study

Hillsborough Community College
Case Study – HCC

About HCC

• Located in Tampa, Florida
• President, Dr. Ken Atwater
• 45,000 students
• 5 campuses and three centers
• 5\textsuperscript{th} largest school in Florida College System
• $170 million annual budget
• 21,000 FTE
• 2,200 employees
• $1.1 billion economic impact to Hillsborough County
• 48\% of students receive financial aid
• Annually award over $195 million in financial aid
HCC Improving the Student Experience

- Centralize Enrollment Management Operations
  - Financial Aid
  - Veteran Affairs
  - Registrar
  - Admissions
- Implemented Outsourced College Wide Call Center
- Outsourced back office processes to improve operational efficiency
- Focused campus student services on customer services and Student Retention
- Experienced an overall improvement in student satisfaction
Faced with a $30 million cut in the FCS resulting in $7.5 million funding decrease at the College, the one place to make up revenue is in student tuition.

1. New admitted students not enrolled / No FAFSA
   **Goal**: Complete FA application and Enroll
2. Continuing Students awarded FA but not enrolled
   **Goal**: Re-Enroll
3. Students not enrolled - Financial aid applications incomplete
   (Missing **Verification Documents**)
   **Goal**: Submit missing documents and Enroll
# Case Study #1

## New Admitted Students Not Enrolled / No FAFSA

<table>
<thead>
<tr>
<th>Total Student Group</th>
<th>3,484</th>
</tr>
</thead>
<tbody>
<tr>
<td>FAFSAs Submitted</td>
<td>799</td>
</tr>
<tr>
<td></td>
<td>23% (3,484)</td>
</tr>
<tr>
<td>Financial Aid Awarded</td>
<td>472</td>
</tr>
<tr>
<td></td>
<td>14% (3,484)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>% Students Awarded</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Students Enrolled</td>
<td>397</td>
</tr>
<tr>
<td></td>
<td>84% (472)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No Aid but Enrolled</th>
<th>591</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>17% (3,484)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Enrolled</th>
<th>988</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>28% (3,484)</td>
</tr>
</tbody>
</table>
Case Study #1 Benefits

<table>
<thead>
<tr>
<th></th>
<th>Credits</th>
<th>Tuition Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edfinancial Group</td>
<td>6,259</td>
<td>$653,377.01</td>
</tr>
<tr>
<td>Campus Group</td>
<td>3,883</td>
<td>$405,346.37</td>
</tr>
<tr>
<td>Total Credit hours</td>
<td>10,142</td>
<td>$1,058,723.38</td>
</tr>
<tr>
<td>FTE</td>
<td>388</td>
<td></td>
</tr>
</tbody>
</table>
# Case Study Issue #2

## Continuing Students Not Enrolled But Awarded Financial Aid

### Student Group 1,477
- **Enrolled**: 62% (915)
- **Credit Hours**: 8,629.50
- **FTE**: 288
- **Revenue**: $900,834

**LOW HANGING FRUIT**
Financial Aid Verification

Students who complete the FASFA form may be required to send in additional information if selected by FSA for Verification. Typically, CC’s see a higher rate of students selected for verification.

Reasons for high CC verification numbers:
• PELL eligible students are more likely to be selected for verification
• Average Estimated Family Contribution (EFC) at HCC is $3,643

7,437 Students selected for verification at HCC for Fall 2017
Financial Aid Verification

Documents that students are required to submit for verification are situation specific. These documents include:

- Parent and/or student IRS tax transcript
- Verification worksheet
- Parent and/or student W-2
- 1099 forms
- Child support documents
- Documentation for Supplemental Nutrition Assistance Program (SNAP)
Students who fail to complete verification will not receive financial aid and will likely not enroll.

Students who comply more quickly and complete verification will be awarded sooner – ideally prior to class begin dates.

Benefits:
- Students know in advance that aid is confirmed and available
- Reduce student financial anxiety associated with paying for college/living expenses
- College receives aid funds on time
Case Study – HCC Verification Completion

Verification Project Goals

#1 Increase the number of students who complete verification

#2 Increase the number of students that meet the financial aid priority deadline
### Case Study #3 Results

Students Not Enrolled with Incomplete Financial Aid Applications  
(Missing Verification Documents)

| Description                                      | Count | Percentage  
|--------------------------------------------------|-------|-------------  
| Targeted Students                                | 2,959 |              
| Students who completed Files                     | 1,223 | 42% (2,959)  
| Students who completed Files and Enrolled        | 1,033 | 84% (1,223)  

## Case Study #3 Benefits

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Hours</td>
<td>10,076</td>
</tr>
<tr>
<td>FTE</td>
<td>336</td>
</tr>
<tr>
<td>Tuition Revenue</td>
<td>$1,051,781</td>
</tr>
</tbody>
</table>


Available Results Summary

- Fall 2016 to Fall 2017 Enrollment difference +745 students +210 FTE
- HCC Staff and Edfinancial contacts: 7920 Students Contacted /2936 Enrolled (37%)
- Edfinancial contacts alone: 4436 Students Contacted /1948 Students enrolled (44%)
- Total Revenue: $3,011,338
- Total FTE: 1,012
- By the end of add/drop, the college was up in FTE and Headcount and 99% toward the end of semester FTE goal
- Other area colleges were flat or lower than prior year for same time period, as expected
Evaluation and Future Campaigns

• Assist our largest Campuses with outsourced calling or nudging for the various new admitted student groups

• Campuses and Edfinancial will contact the same student cohorts

• Continue to campaign for continuing students

• Incorporate outbound campaigns with our new CRM system under development
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