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**REPORT OF THE EXTERNAL REVIEW TEAM
ON ENROLLMENT MANAGEMENT & SERVICES
AT THE UNIVERSITY OF ILLINOIS**



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AUGUST 2011

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**REPORT OF THE EXTERNAL REVIEW TEAM
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I. INTRODUCTION & BACKGROUND

Enrollment management entails coordinating all aspects of enrolling and graduating students, including:

- Working with administrative leaders to develop a strategic vision for shaping a first-year class of new freshman and transfer students (e.g., demographic profile, preparedness) that is appropriate to the mission and character of the campus;
- Facilitating partnerships with high school counselors, K-12 leaders, and, in the case of transfer students, community college and other college advisors, to promote the university to qualified students;
- Providing support and advice in the development of effective marketing tools and strategies to encourage applications from qualified students;
- Offering analytic support to facilitate recruitment strategies and admissions decisions, including the development of financial assistance packages;
- Supporting orientation and pre-enrollment services to maximize student enrollment and preparation;
- Collaborating with student services to ensure appropriate mentoring for students, particularly “at risk” students;
- Partnering with other campus constituencies to ensure student success in the form of timely graduation.

In essence, at top institutions around the country, enrollment management is a highly professionalized, data-driven operation that tracks prospective students from their pre-college experiences to their college graduation, designing effective pathways to ensure their success. It is built on a highly collaborative model in which enrollment management professionals work with both internal and external constituencies to develop strategies that will offer every qualified student a pathway to a baccalaureate degree.

University of Illinois (UI) President Michael J. Hogan requested an external review of enrollment management and services at the University’s three campuses:

- University of Illinois at Urbana-Champaign (UIUC),
- University of Illinois at Chicago (UIC)
- University of Illinois at Springfield (UIS)

Lee H. Melvin, Vice President for Enrollment Planning and Management at the University of Connecticut led the review, accompanied by Dr. Kedra Ishop, Vice Provost of Admissions at the University of Texas at Austin. Their biographies are included in Appendix A.

A. Charge to the External Review Team

- Examine opportunities to improve recruitment and admissions, particularly when it comes to underrepresented students, non-resident students, and high ability students.
- Identify strategies to streamline, coordinate, and improve efficiencies in recruitment and admissions.
- Evaluate the relationship between admissions and financial aid operations.
- Suggest collaborative strategies to enhance student retention and graduation, and recruitment.

B. Inventory of Information & Interviews Requested by Review Team

We began by asking the Vice Chancellors for Academic Affairs and Provosts of each campus to identify key staff in their enrollment management operations, who we could interview and who would provide us with data related to recruitment, admissions, marketing, financial aid, and student support services. Our team requested and reviewed more than forty reports containing information pertinent to our review. A list of these reports is presented in the Appendices. During our six-day visit, we conducted interviews (either individually or in groups) with 46 staff members and administrators. A list of these meetings is shown in the Appendices.

II. OBSERVATIONS OF CURRENT ENROLLMENT MANAGEMENT PRACTICES

Each campus described broad, varied, and robust recruitment activity in the Chicago metro area, across the state and, to a much lesser degree, beyond state and national borders. All displayed a culture focused on student success; and all appeared eager to improve operational efficiency and accountability in order to reach institutional enrollment goals. Clearly, enrollment managers on each campus, so far as they understand campus enrollment goals and strategies, are committed to enhancing enrollment (and the educational experience of students) through a competitive admissions process and appropriate financial aid packages.

Enrollment services are delivered separately on each campus, with each campus establishing its own admissions criteria and making its own admissions decisions.¹ This model of locally setting admissions criteria is common at multi-campus universities and we believe it is appropriate for the University of Illinois. After all, the University's campuses are distinct in mission and, to some extent, in the students and community they serve. UIC takes pride in its urban mission and is also the primary location for the University's health science colleges. UIS aspires to be one of the Midwest's finest small public liberal arts universities. It features small classes and, given its location in the state capitol, has strengths in public affairs and a strong civic mission. It's also worth noting that UIS is gaining national prominence for its on-line programming.² UIUC was the first campus of the University of Illinois and is its land-grant campus, housing the University's agricultural college and a comprehensive set of undergraduate, graduate, and

¹In some cases, especially at UIUC and UIC, the admissions criteria are determined at the collegiate/school level. For some colleges, the admissions decisions are made at the college level; for others, they are made at the campus level according to the criteria established at the college level.

²Although we did not study the on-line programming across the University's campuses, we believe this is an area of key opportunity for the University and a review should be undertaken soon. Several of those we interviewed expressed some concern regarding the replication of on-line programs across campuses, the inefficiencies of such replication, inconsistencies across these programs in content and delivery, and a missed opportunity on the national stage for enhancing the visibility of the University as a whole.

professional programs. UIUC is nationally and internationally recognized for its strong research programs, particularly in the physical sciences, computer/information sciences, and engineering, and has outstanding humanities, fine arts, and social science offerings.

These identities are important to the campuses and to the overall strength of the University as a whole. They are also an asset in recruiting students because, when approached as a whole, they allow the University to address a broad variety of student needs and interests. Indeed, while it is appropriate that each campus sets its own admissions criteria and makes its own admissions decisions, this process should not preclude cross-campus collaboration that could leverage the University's multiple identities and missions, and hence, the varied options available to potential students, particularly in-state students.

In our review, however, we found few cases of such coordination across the campuses. One involved a commendable program between the UIUC College of Engineering and the UIC College of Engineering through which students not admitted to the UIUC College are re-directed to the UIC College. There may be other examples, as well, but they appear to be the exception rather than the rule. More typical is a fall event, the "Salute to Academic Achievement," which is attended by outstanding students, mostly from underrepresented groups, whom the University is trying to recruit. As described to us, the event features information tables sponsored by each campus but with little effort to identify the University as a whole and with competition between the campuses for the same population of diversity students. "Salute to Academic Achievement," like the Presidential Award Program (a scholarship program for underrepresented students) is administered semi-centrally. In other words, both are funded and sponsored by the Office of the President, specifically the Vice President for Academic Affairs, but each campus organizes its own strategy, distributes its own information, contributes additional funds, and manages its own scholarship notifications. Better coordination and direction, we believe, might well lead to a more efficient management of such initiatives, to more effective recruitment of underrepresented students, and to better marketing of the University and each of its campuses.

After several days of extensive interviews, meetings, and the review of various reports and documents, we found several opportunities for the University to leverage its outstanding national and international reputation and to enhance enrollment outcomes, while also improving efficiency and reducing costs. We believe that the path to such improvements lies in greater sharing and coordination of best practices, resources, and information systems across the campuses. In the sections below, we discuss nine areas of opportunity with our recommendations, which, if implemented, can help the campuses and University improve their enrollment and student outcomes.

III. OPPORTUNITIES & RECOMMENDATIONS

A. Strategic Enrollment Goals

Although each campus has strong enrollment management practices, we noted a lack of clarity regarding enrollment goals. The campus-based enrollment management teams, along with admissions deans in the colleges and schools, expressed a desire for better-articulated enrollment goals in order to guide recruitment and yield strategies.

For example, if one goal was to improve retention and graduation rates – and this should be a goal – progress might be measured by the selectivity and enrollment yield of enrolling freshmen. Selectivity refers to the competitiveness of an institution vis-à-vis its peers. More selective institutions admit a smaller proportion of applicants out of the total pool of those who apply. Thus, a lower percentage of admittees represents a more selective institution. More selective institutions also tend to admit more highly qualified students than less selective institutions. As a result, they tend to graduate students more rapidly and at higher rates.

It is important to recognize that selectivity is not the antithesis of accessibility, particularly for an institution like the University of Illinois with its three outstanding campuses and strong articulation arrangements with community colleges across the state. Each of the University's campuses has different admissions criteria, which provides opportunity for a highly prized University of Illinois degree for any qualified student. Outstanding enrollment management programs are ones that work with the institution's leadership to ensure that students who are admitted can succeed in the institution or campus to which they are admitted. That is, they must be adequately prepared for classroom success and be provided with the right environment to enable timely graduation. The University of Illinois is well-positioned in this regard, insofar as the three campuses have different admissions criteria and different learning environments, enabling it to accommodate a range of students. We note in different sections of this report, however, that the University may not be fully realizing the potential of its multiple campuses to enhance accessibility in its recruitment, admissions, and transfer arrangements.

When it comes to selectivity at the University of Illinois, the campuses vary in relationship to their distinct peer groups (listed in Appendix D), but are relatively close to one another. While UIC and UIS are out-performing their peers in selectivity, at about 63% and 59%, respectively, UIUC is substantially less selective than its peers, and less selective than either UIC or UIS, at about 67%.³ Also, as the charts below indicate, UIS has been relatively stable in its selectivity since 2006, while UIUC shows an increase in selectivity (indicated by the downward trend in the blue line). Yet, the trend toward greater selectivity on the part of UIUC nearly parallels that of its peers, suggesting only marginal gains from 2006 through 2010. In comparison to its peers, UIC has lost ground, becoming a bit less selective over these years, while its peers have become more selective, although UIC is still marginally out-performing peers.

Again, selectivity (and yield, discussed below) are only two of many metrics used to track performance and assess how the institution is doing vis-à-vis peers. For instance, we note that UIUC continues to have a robust retention and graduation rates, suggesting that the students it admits are succeeding. Yet, a declining trend in selectivity can be a precursor to subsequent declines in areas like retention and graduation. It can also signal whether an institution's applications might be starting to decline. Consequently, enrollment management professionals tend to follow selectivity closely.

³A lower value indicates higher selectivity (i.e., a lower percentage of students who apply are admitted).

**Selectivity
 (Percent of Total Applicants Admitted Divided by Total Applicants)**

UIC	
UIS	
UIUC	

The next set of charts shows the “freshman admissions yield” for each campus vis-à-vis its peer average. The yield is the percent of admitted students who actually enroll in the institution.⁴ This is another important metric in enrollment management, as the goal of most institutions is to enroll the students they recruit, not simply admit them. Further, stable or increasing yields are often indicative of robust strategic goal-setting and planning, targeted recruitment, appropriately selective admissions criteria, and a smart, strategic use of financial aid.

⁴ A higher value for yield is indicative of stronger performance (i.e., a larger percentage of students who are admitted actually enroll).

Again, these charts depict the period from 2006 – 2010. We see that UIS is out-performing its peers at about 38%, while UIC and UIUC are behind their peers, at about 34% and 38%, respectively. UIUC has fallen from about 50% to about 38%, as depicted by the downward blue trend line in its chart. Likewise UIC shows a downward trend, losing 4 percentage points (from 38% to 34%). UIS has remained relatively stable, moving from 37% to 38%, although enrollment data for UIS suggests that it is losing ground in its ability to recruit both new freshman and transfer students. Some of these trend lines, particularly at UIUC are cause for concern, as they may suggest a decline in competitiveness inside their respective markets.

Admissions Yield
(Percent of Total Students Enrolled Divided by Total Students Admitted)

UIC	<p style="text-align: center;">UIC Peer Average</p>
UIS	<p style="text-align: center;">UIS Peer Average</p>
UIUC	<p style="text-align: center;">UIUC Peer Average</p>

It's important to note that in the absence of clear goals, metrics like selectivity and yield have little meaning. In other words, clear enrollment goals, appropriate financial aid, and other strategies designed to achieve these goals, along with benchmarkable metrics to measure performance are critical to advancing the mission of the institution. As we noted earlier, we believe such goal-setting would benefit the University of Illinois.

In order to allow for sufficient time to develop and implement recruitment and yield goals, we recommend establishing strategic enrollment goals for each campus as early as possible and no later than the beginning of the new fiscal year. Doing this early in the recruitment process will allow admissions and financial aid operations time to develop thoughtful and data-driven models critical to building the freshman and transfer student classes.

Understanding how enrollment goals are determined would benefit enrollment managers across all campuses. To fully leverage its three campuses, the University might consider developing a University-wide "Projection Enrollment Plan." Doing so will require collaboration between multiple offices, including the President, Vice President for Academic Affairs, Chancellors, Provosts, and Deans.

In setting goals, the campuses should pay close attention to cultivating their transfer and international student populations. Based on our review of the enrollment data and discussions with campus admissions leaders, we recommend stabilizing freshman enrollment at Urbana-Champaign, where freshman and sophomore classes are close to capacity, increasing transfer and international enrollment at all campuses, and increasing enrollment (freshman and transfer) at Springfield, where the campus has existing capacity. In the case of the Springfield campus, growing enrollment to existing capacity will require serious consideration of tuition levels, better use of financial aid packages, and a serious marketing effort that explains the "value-added" of this campus, as opposed to others in its primary market area.

We are aware that all three campuses are exploring ways to increase non-resident recruiting, including international recruiting. UIS and UIC have very few non-resident and international students, while at UIUC 21% of the freshman class comes from beyond Illinois (about half of them from overseas, which is a strong record in international student populations vis-à-vis other public research universities). Overall, however, non-resident students represent more than 30% of the student population on average, among other Big Ten universities. When you understand that students are likely to live and work in the state where they take their degrees, recruiting students from other states amounts to recruiting the next generation of Illinois citizens and professionals – and can help reverse the current "brain drain" that comes from the loss of Illinois students to universities and colleges in other states.

It is not clear if the three campuses have deep experience in recruiting non-resident students and efforts to improve in this area are important, particularly when it comes to the recruiting of U.S. students outside of Illinois, who are more than likely to remain in Illinois as part of the state's permanent workforce. As for international students, they contribute to the diversity and global richness of the campuses, which helps to create a learning environment that is more cosmopolitan and more likely to prepare students for life and work in what is becoming a more diverse nation and a more globalized economy. What is more, while the major gains are educational, international students also tend to have substantial financial resources to cover the non-resident differential, without draining resources from the financial aid pool. In this sense, and in other ways, they help to subsidize the cost of education for resident students.

Based on our interviews and the data we received from the campuses, it also appears that, until recent years, less strategic attention has been paid to recruiting transfer students from other Illinois colleges, even though such students would help the University maintain a proper balance between resident and non-resident students and would remind the public that the University seeks to remain accessible to all qualified students.⁵ What is more, evidence indicates that transfer students who meet academic and curricular requirements perform as well as students who begin their college career at the institution.

Recommendation 1: *Establish strategic enrollment goals for each campus no later than the new fiscal year.*

Recommendation 2: *Establish a University-wide Projection Enrollment Plan through a collaborative process engaging the President, Vice President for Academic Affairs, Chancellors, Provosts, and Deans.*

Recommendation 3: *Stabilize freshman enrollment at UIUC; increase transfer enrollment at all campuses; increase international enrollment at UIS and UIC, and grow UIS enrollments to campus capacity.*

B. Strategic Diversity Enrollment Goals

Although the University’s diversity statistics compare favorably to other Big Ten universities they are less compelling when compared to the state’s demographic profile, and especially the profile of Chicago.

Fall 2009 Percentage of Undergraduate Students from Underrepresented Groups by Campus, Compared to High School Students in State of Illinois, Chicago Area Counties, and Chicago Public Schools

Race/Ethnicity	High School Students in State of Illinois ¹	High School Students in Chicago Area Counties ^{1*}	High School Students in Chicago Public Schools ¹	UIC ²	UIS ²	UIUC ²
White not Hispanic	57.0%	44.9%	8.0%	44.9%	72.3%	67.4%
Black/African-American	20.1%	25.2%	50.0%	8.6%	13.4%	7.3%
Hispanic/Latino	18.5%	24.1%	37.9%	18.7%	3.3%	7.4%
Asian/Pacific Islander	4.1%	5.5%	3.5%	22.7%	3.5%	14.5%
American Indian/Alaskan Native	0.3%	0.2%	0.2%	0.2%	0.6%	0.3%
Unknown	--	--	--	4.9%	6.9%	3.1%

Sources ¹National Center for Education Statistics, Common Core of Data 2009-2010.

²Illinois Board of Higher Education, Data Book

*Includes Cook, DuPage, Kane, Kendall, Lake, McHenry, and Will County

Note: University of Illinois data excludes non-resident aliens.

⁵In 2007, UIUC received a Lumina Foundation Grant to facilitate the development of articulation agreements with community colleges and the Illinois Board of Higher Education is also pushing forward such efforts. We believe it will be important for all the campuses to continue these efforts, but particularly UIUC, where interviewees reported that the campus is reaching its capacity with respect to freshman enrollments.

This table presents some useful information to assess the enrollment of underrepresented students and provide the basis for goal-setting. With respect to Black/African-American and Hispanic/Latino undergraduates, none of the campuses approximates the percentage of high school students from these groups in the Chicago Public Schools or Chicago area counties. UIC comes close to the percentage of Hispanic/Latino high school students in the entire State of Illinois and has the highest percentage of students from this underrepresented group of the three campuses. UIS has the highest percentage of Black/African American students of the three campuses, although at 13.4%, it is substantially below the percentage of high school students from this group in the State, Chicago Area Counties, and Chicago Public Schools. The percentage of Asian/Pacific Islander students at UIS matches the percentage of high school students in the Chicago Public Schools, although UIS is below the State and Chicago Area Counties on this measure. The percentage of Asian/Pacific Islander students enrolled at both UIC and UIUC well-exceeds the percentage of high school students from this group in the State, Chicago Area Counties, and Chicago Public Schools. Both UIC and UIUC approximate percentages of American Indian/Alaskan Native in the State, Chicago Area Counties, and Chicago Public Schools (all of which are low), while UIS exceeds it. Still even at UIS, the numbers are quite low for this group. While we would not necessarily expect the University of Illinois campuses to enroll underrepresented students at the level of their representation in each of these areas, the gap between the University's enrollment and the State populations for Black/African American and Hispanic/Latino students is substantial and deserves attention.⁶

Although each campus allocates significant resources to increasing diversity, precise campus goals are not evident and interviewees noted the lack of precision. Dovetailing on our recommendation to establish clear overall enrollment goals, we believe it is important for the University and its campuses to clearly articulate diversity enrollment goals and allocate resources, including financial aid, to achieve them.

Recommendation 4: Establish clear goals with respect to underrepresented students on each campus, which together, map onto University goals.

C. Diversity Recruitment Strategies to Support Strategic Diversity Enrollment Goals

The Greater-Chicago area provides a strong opportunity for enhanced diversity recruitment. UIC, in particular, has developed very robust community and school networks that can be leveraged to facilitate diversity recruitment. Although UIC might take the lead, given its location and well-established networks, all campuses have a chance, by working together, to enhance diversity recruiting in the Chicago Public Schools. Needed, is a unified diversity recruitment strategy that will make the most efficient use of limited resources. This seems to us to be the best way for the University of Illinois to become a diversity leader in the state and nation.

⁶Statistics do indicate that minority students are often less likely to be adequately prepared for success at a four-year college than students from majority populations. Yet, recruiting and admissions staff with whom we spoke acknowledged that the University of Illinois struggles to successfully recruit qualified minority students (i.e., that the yield rates are low for these students), suggesting that clear goals and strategies for achieving those goals, along with greater coordination across the campuses would lead to improved outcomes in this area.

During our interviews, we noted a concern that each campus competes against the others for the same diversity student base in Chicago and surrounding suburbs. Nonetheless, a review of documents submitted by all three campuses did not reveal a strategic diversity recruitment plan for any of them, let alone some kind of coordinated strategy. There are several references to programs aimed at multiculturalism and “feeder” schools, but expected outcomes were absent and the programs have not been regularly evaluated for their effectiveness.

Similarly, a variety of different campus units allocate resources for diversity recruitment and enrollment, often without much in the way of coordinated oversight. This approach can be confusing to high school counselors and students, and lead to redundancies, unnecessary competition, and increased costs. Again, a coordinated effort is needed to design a strategic plan to address the diversity aims of the University, its campuses and their schools and colleges. To guarantee a unified diversity message, this effort should be led by a single diversity recruitment coordinator, who would bring together campus partners to assist with implementing these efforts and reducing unnecessary competition and wasteful redundancies. The coordinator should serve on the admissions and financial aid leadership team and provide continuous feedback to the campus community on diversity-related issues and challenges. The diversity strategic recruitment and enrollment plan could evolve from a University-wide working group with shared accountability for outcomes.

There appears to be good support for such an approach on the campuses. Student support services at each campus expressed a keen interest in developing the strong campus partnerships that are crucial to success in enrolling, retaining, and graduating minority students. Several admissions deans shared their involvement with admissions decisions and a desire to increase their role in diversity recruitment. In addition, the Diversity Undergraduate Enrollment Task Force expressed a strong commitment to assisting with the recruitment and enrollment of minority students, as did those involved in the President’s Award Program.

Given this supportive sentiment, we believe there is an opportunity to redesign campus partnerships and strengthen the University’s commitment to diversity recruitment, enrollment, and graduation. A diversity recruitment plan for all campuses would encompass the views and opinions of the campus community and leadership in admissions and financial aid. Best practices in enrollment management suggest that such partnerships can be very effective, but require (1) clear understanding of the role and authority of each partner; and (2) strong coordination of the efforts and ongoing communication between partners. We recommend that the University and its campuses clearly articulate the roles and authority of campus partners and fully leverage their expertise and access to diverse groups to increase the enrollment of underrepresented students on the campuses.

In summary, after interviewing admissions, financial aid, and other campus constituents with regard to diversity recruitment, we recommend a stronger coordination of recruitment and enrollment programs and the participation of all campus partners. To effect these recommendations the campuses must work collaboratively and develop a University undergraduate diversity recruitment plan. We believe that this will improve recruitment in the Chicago Public Schools and under-enrolling counties, as well as allow for the

engagement of appropriate partners in the effort. The coordinator role we suggest would serve the whole university and work collaboratively with student support services on all campuses. We have no doubts about the importance and value placed on diversity by the University leadership and each campus. Given the state and national focus on this issue, we conclude that stronger coordination would greatly enhance the efforts and outcomes for all three campuses.

Recommendation 5: Develop a strategic diversity recruitment plan aimed at increasing enrollment for all undergraduate majors, led by a coordinator who would work with admissions and financial aid staff on the campuses.

Recommendation 6: Clearly articulate the roles and authority of campus partners and fully leverage their expertise and access to diverse groups to increase the enrollment of underrepresented students on the campuses.

D. Common Application Consortium

The desire by the University of Illinois to increase the applicant pool of high ability and diverse students for all campuses, leads us to recommend that it pursue membership in the Common Application Consortium (CAC). The Common Application allows students to complete a single application, which is then submitted to any of the Consortium's more than 400 members. As stated, on its web site, the Consortium is:

“ . . . a not-for-profit membership organization that, since its founding 35 years ago, has been committed to providing reliable services that promote equity, access, and integrity in the college application process. We serve students, member institutions, and secondary schools by providing applications - online and in print - that students and school officials may submit to any of our more than 400 members. Membership is open to colleges and universities that promote access by evaluating students using a holistic selection process.” (Common Application Consortium Web Site, June 2, 2011 <http://www.commonapp.org/CommonApp/Mission.aspx>)

Member institutions in the CAC have realized an average increase of 10% to 20% in applications for admissions. Also, this Consortium provides enhanced brand visibility to a wider audience and increases options for students applying to UI campuses. Recently, public institutions such as the University of Michigan, University of Connecticut, and University of Virginia have joined the CAC, and more are bound to follow. Early reporting data is showing 20% to 25% increases in their application pools. Membership in the CAC would also allow all University of Illinois campuses to collect data needed for a holistic admissions review process, especially as it relates to the enrollment goals for individual campuses. Joining the CAC does not prevent institutions from using their existing admissions application, especially to serve the needs of transfer applicants or other potential applicants who may not be interested in applying elsewhere. Nor does it require altering admissions criteria on any campus. Given the growth in this market, and its many advantages, we recommend that the University of Illinois join the Common Application Consortium.

The CAC would allow students applying to the University of Illinois to identify their desired campus. In addition, students could select a 2nd and 3rd choice campus for placement, with the possibility of transfer after one or two years, if space allows and academic performance permits. Alternatively, through greater coordination of admissions across the campuses, the University could determine placement based on the admission criteria and available enrollment options on each campus. In short, this would allow the University to re-direct applicants across its campuses and increase admissions opportunities to the University for all Illinois residents.

Based on conversations with the college's admissions deans (ADs), we believe the CAC could enhance collaboration between the offices of admissions and the admissions deans. ADs could collect data from the CAC to analyze trends in majors, diversity, residency, and gender, along with many other variables collected through the application. With these data, ADs can keep their colleges well-informed about the applicant pool and engage in more informed discussions about enrollment goals with campus admissions officers, who would have access to the same information. Our review of the admissions processes for each campus revealed that most ADs have reduced their involvement in the decision process and instead, provide guidelines to the admissions officers who implement them in the admissions decisions. (The School of Business at UIUC is something of an exception to this trend). A strategic enrollment plan combined with strong partnerships with campus ADs, will empower admissions offices to shape the class and continue to meet enrollment goals of the University, campuses, and colleges.

Recommendation 7: Join the Common Application Consortium.

E. Information Systems Supporting Enrollment Services

Key to success in recruitment and enrollment is managing and leveraging student data. Advances in technology have created new opportunities for managing student information, developing targeted communications, and rapidly adjusting recruitment efforts through data management and analysis. Two key tools in enrollment management are student information systems (SIS) and customer relation management systems (CRM). The former is a database containing information about students, including demographic profiles, residency, academic interests, and academic records. The latter, CRM, integrates with the SIS to issue targeted communications that leverage the SIS data. For instance, students with an interest in pre-medicine can be identified in the SIS and specially designed custom postal mailings and e-mails can be sent to them via the CRM. Such targeted communications can enhance student interest in an institution, and ultimately increase applications and enrollment yields.

At the University of Illinois, each campus uses such systems (at UIS the CRM system is just being introduced). They are used differently, which is appropriate, given the unique campus identities and students they seek to recruit. Yet, there are opportunities for all the campuses to benefit from the extraordinary depth and breadth of the records held across all campuses, particularly when it comes to transfer arrangements, re-direction opportunities in admissions, analysis of trends in admissions and enrollment, and helping each campus meet its enrollment goals (including diversity goals). Moreover, there are opportunities to share best practices in how the systems are deployed and to develop a centralized strategy for purchasing, maintaining, and updating these systems at lower costs.

One concern consistently raised with regard to capitalizing on information technology that supports enrollment services was the restricted access to the SIS by campuses. That is, only those authorized on each campus may access the records of students who have applied to, been admitted, or are enrolled on that campus. This undermines the extent to which each campus and the University as a whole can utilize the entire warehouse of records to optimize service to students and outcomes with respect to University and campus goals. Thus, we recommend that the University provide permeable access to all the SIS student data at all campuses for authorized staff in the admissions, financial aid, and registrar offices. Of course, such access must recognize the policy changes instituted to ensure that admissions decisions are not susceptible to inappropriate outside influences, and that they abide by state, federal, and contracting rules that may limit information sharing. With regard to these latter points, the University might consider adopting University-wide contracts and a different manner of organizing enrollment management operations to address such limitations.

There are a number of benefits from such permeable access by authorized staff. For instance, it will benefit students transitioning across University of Illinois campuses, save costs for the University, and encourage increased collaboration between campuses. By way of example, a student transitioning from UIUC to UIS already has records stored in the SIS. If permeable access was available to authorized staff, several routine steps to facilitate a transfer could be eliminated, thereby enhancing student services, while reducing the staff needed to perform these duties. Additionally, allowing authorized staff on all campuses access to student data engenders opportunities for increased recruitment and enrollment initiatives for Illinois residents.

In addition to capitalizing on the University's shared SIS, we recommend that the University re-think its vision for a fully developed CRM for all campuses. Indeed, a fully developed and University-wide CRM should save money, reduce staffing, and increase the efficiency of university communications with both prospective and, at times, continuing students. For instance, the director of admissions at the UIUC campus implemented a CRM in 2008 with reported savings of over \$200 thousand dollars. By her account, the CRM is providing the expected savings, and these funds were reallocated to support other office priorities. We discovered, however, that UIC and UIUC purchased different CRM software, although both products provide similar functions (and UIS is purchasing the same system as UIC this summer). Thus, the University will now own two CRM systems, both with similar functionality. The result is that the University will incur redundant licensing, maintenance, and staffing expenses to support both systems. We recommend capitalizing on the promise of the SIS and CRM systems through a detailed analysis of the current functionality of the systems and opportunities to develop a University-wide purchasing and maintenance strategy. We further recommend that this analysis be handled in conjunction with the University's information technology leadership.

Recommendation 8: Provide permeable access to the SIS student data at all campuses for authorized staff in the admissions, financial aid, and the registrar offices.

Recommendation 9: Capitalize on the promise of the SIS through a detailed analysis of the current functionality of the system and the future vision of a fully developed CRM to support recruitment and enrollment goals on all three campuses, in conjunction with the University's information technology leadership to generate costs savings in purchase, maintenance, and updating of the systems.

F. Admissions & Financial Aid Operations and Processing

A University-wide student information system (SIS) should make it possible to combine two of the most important components of a strategic enrollment plan – admissions and financial aid – which currently exist independently on all three campuses. For example, collecting and reviewing applications centrally would streamline the process and produce savings that can be reallocated to recruitment, enrollment, retention, and graduation initiatives. Furthermore, a streamlined system lowers the cost and effort required by students and their families who are interested in applying to more than one University of Illinois campus. It also can lead to a much larger pool of applicants, with larger numbers of students from underrepresented groups. Examples of successful centralization can be found at the University of California and State University of New York systems, as well as The Ohio State University and Pennsylvania State University. We recommend that the University of Illinois adopt a centralized admissions and financial aid processing system.

It is important to note that centralizing these services does not prohibit each campus from providing admissions and financial aid services to its constituents. In fact, it is likely to increase the number of applications each campus receives and thus the need for such services. Further, it does not require common admissions criteria or enrollment goals. Given their unique identities and missions, each campus can and should continue to develop admissions criteria and enrollment goals that support its distinctive mission. Consequently, we believe that each campus must retain offices to support student services, distribute information, and enhance community outreach.

Nonetheless, in order for this recommendation to be effective, shared access to an SIS is required, as discussed above. Authorized staff on all campuses would retain the ability to collect and enter required documents to complete an application, but management and reconciling would be handled centrally. By centralizing these business functions, we believe the University of Illinois could enhance service to its campuses and students, while saving costs.

Recommendation 10: Adopt a centralized admissions and financial aid processing system.

G. Financial Aid Packaging Philosophy & Scholarship Awarding Practices

We discovered major concerns on all three campuses with student debt levels, the price of a four-year degree, and limited resources to recruit minority and high achieving in-state students. To address these issues, we recommend updating financial aid packaging philosophies and scholarship awarding practices. Several reports on affordability and student debt levels were presented for our review and most make a strong case to rethink how financial aid is distributed. Centralizing the current scholarship process is desired by some at the University; however, we recommend the current decentralized program remain in place and encourage financial aid to continue developing strong partnerships with each school or college to maximize available funds to entering students. What is needed is stronger coordination among these partners on the campuses.

The current scholarship menu for entering students appears to be complicated and constricting. Moreover, awards are often communicated to students late in the enrollment decision process. In some cases, this is due to late decisions on tuition-setting by the Board of Trustees, owing largely to uncertain legislative processes and budget decisions. In other cases, however, the fragmented process within campuses, in which central awards are communicated by some offices, federal need-based awards by others, and collegiate merit-based/need-based awards by still others, creates confusion and limits the University's effectiveness in using scholarships and financial aid as a recruitment tool.

Interviewees noted that collegiate decisions sometimes come long after tuition has been set and enrollment decisions have been made by students. This late and fragmented process creates confusion for students and does little to optimize recruitment efforts. We recommend a strategic redesign of these awarding practices, to encourage higher achieving and diverse students to enroll on all University of Illinois campuses. A review of six-year graduation data, student indebtedness, and default rates, suggest the value of a University of Illinois degree remains marketable. Yet, competitors continue to successfully siphon off Illinois residents with the highest academic records and those from underrepresented populations. We believe that over-hauling award practices may contribute significantly to the improved competitiveness of the University in the recruitment of all students. Thus, our primary recommendations are to (1) coordinate award communications from all sources to each student to the extent possible through a single letter/e-mail; (2) ensure that tuition decisions are made by the end of February to allow admissions and financial aid offices to develop and communicate financial aid packages to students in a timely manner. We elaborate the basis for these recommendations and related ones below.

All three campuses reported that their financial aid philosophy is to provide most of the limited University institutional funding to qualified students with the highest need. It's important to note, however, that often highly meritorious students also have substantial need. That is, many students are eligible for a combination of merit- and need-based aid. Given the various socioeconomic statuses of students on each campus, we recommend that the University continue using its current federal awarding methodology⁷ combined with a modified leveraging aid methodology⁸ to meet enrollment goals. The equity packaging philosophy⁹, an industry best practice at many institutions, should be reexamined to ensure national data is properly analyzed and applied when formulating disbursement of limited financial aid funds. In addition, all three campuses should analyze the cost of attrition to inform packaging formulas. That is, in determining financial aid packaging, the University should analyze the potential for attrition likely to result from various packages, recognizing that enrolled students who fail to graduate due to financial burdens represent a cost to the

⁷ Federal awarding methodology relies on household data, such as earnings and expected educational costs to calculate financial need. The cost of attendance, minus the estimated family contribution (based on household resources) determines financial need. Generally, the amount of need-based aid awarded under federal programs may not exceed the financial need.

⁸ This methodology entails combining analysis of a student's academic achievement with her/his financial need to determine award levels (i.e., a combination of need- and merit-based aid).

⁹ Equity packaging assures that a certain level of financial aid is awarded to eligible students based on their expected family contribution up to a fixed amount or up to some fixed percentage of the cost of attendance.

institution and families both in terms of performance and actual investment. We recommend that the financial aid packaging philosophy for each campus be aligned with University and campus enrollment, retention, and graduation goals.

On all three campuses, the federal methodology is applied to determine financial aid disbursements. Many competing institutions use additional strategies such as the aforementioned leveraging methodology to influence new student enrollment. We believe any new awarding strategies must be combined with increased proportions of net tuition revenues allocated to financial aid. We also recommend using financial aid modeling tools to assist with determining price sensitivity of new in-state and out-of-state students. Given the University's interest in recruiting in the greater-Chicago area, these models could be specially targeted to assess the needs of students in these areas.

We also observed that the bulk of University scholarships are not strategically focused on four-year freshman awards. We recommend the University redesign the current freshman scholarship programs to increase competitiveness in enrolling high-achieving and diverse students by offering more four-year scholarships and framing communications around the four-year package (which could be subject to ongoing progress criteria for the student, such as a GPA, accumulation of credits, and declaration of a major within a certain period of time). A review of the academic criteria needed to renew freshman awards should be evaluated and measured against top competitors. This can be facilitated by examining need-based aid and restructuring portions of these funds to award need-based merit awards.

As the University and its campuses continue to seek the best and brightest students in the state and beyond, it will face increasing competition. Many universities are turning increasingly to philanthropic sources to enhance financial aid pools and thereby enhance their competitiveness. We believe the University of Illinois will need to do the same to remain competitive and increase its competitiveness, particularly in light of trends in declining state support, which we expect to continue. We recommend that the University's enrollment leadership work with the President and Vice Presidents/Chancellors to increase central scholarship funds and continue building strong relationships with the University of Illinois Foundation and advancements units to obtain more funding for student scholarships.

Recommendation 11: Retain campus-specific financial aid programs, but encourage stronger partnerships across awarding units to (1) maximize available funds to entering students, and (2) consolidate award communications to the extent possible through a single letter/e-mail.

Recommendation 12: Ensure that tuition decisions are made no later than by the end of February (and preferably in January) to allow admissions and financial aid offices to develop and communicate financial aid packages to students well before decision deadlines.

Recommendation 13: Analyze the cost of attrition to inform packaging formulas, so as to ensure that the financial aid packaging philosophy for each campus is aligned with University and campus enrollment, retention, and graduation goals.

Recommendation 14: Use financial aid modeling tools to assist with determining price sensitivity of new in-state and out-of-state students, with particular models designed to examine needs of Chicago area students.

Recommendation 15: Redesign the current freshman scholarship programs to increase competitiveness in recruiting and enrolling high achieving and diverse students by offering more four-year scholarships and framing communications to highlight a four-year package.

Recommendation 16: The University's enrollment leadership should work with the President and Vice Presidents/Chancellors to increase central scholarship funds and continue building strong relationships with the University of Illinois Foundation and advancements units to obtain more funding for student scholarships.

H. University Brand & Campus Identities in Marketing Messages

Strong, consistent communications are critical to competitiveness in today's recruitment environment. Successful institutions with multiple campuses take advantage of a strong University identity and couple it with unique campus strengths in their messages. Also, a balanced mix between print and electronic communications to students and parents is crucial in today's highly competitive world of enrollment management. Our review of all three campuses' marketing and branding messages, in both print and electronic environments, revealed the need for a strategic plan to rejuvenate the campus identities and the University of Illinois brand in marketing messages to prospective and enrolled students.

There is an opportunity to rally around the University of Illinois brand, while at the same time promoting the distinctive identity and strengths of each campus. The campuses tend to focus on their local identities and omit emphasizing the strength of the University as a whole. Emphasizing the University of Illinois brand in messaging need not detract from expounding upon the strengths of each campus; in fact, we believe it will enhance students' understanding and appreciation of those strengths. Consequently, we recommend that communications to prospective students leverage the University of Illinois brand, as a whole.

We also observed substantial redundancy across the campuses in "back-office" communication functions (e.g., design and preparation of materials). Consolidating the marketing and communications operations would allow the campuses to both capitalize on a common University brand, while promoting their own distinctiveness, strengths, and missions, and substantially reducing costs. We strongly recommend such consolidation. The funds saved could be reinvested in scholarships and/or recruitment and student support services to improve yields and enhance student outcomes.

One of the toughest balancing acts in student recruitment is how much information to deliver by print versus electronically. Whatever the perfect balance is for the University and its campuses, we recommend all print materials reflect the high quality of education provided at the institution. For many institutions with which the University competes for students, there are three to five signature print pieces in their strategic recruitment lineup, and we recommend that the campuses consider strategically increasing their print collections. The quality of electronic communications is just as important as any print piece. We observed that the sophistication of the admissions and related web sites varied by each campus, as did

e-mail messaging. This relates to our earlier recommendations regarding information systems and we therefore recommend that best practices in development of print and e-materials be shared across campuses to identify opportunities to improve campus communications with students, work collaboratively, and manage costs.

The University and each of its campuses remain keenly concerned about the affordability of a University of Illinois undergraduate degree. Our review of several reports on cost and affordability at all campuses confirms the need for increased financial aid; however, we believe equal attention should be placed on marketing messages focused on price and value. The University of Illinois degree remains in high demand (as evidenced by increasing applications for admission) and recent press reports point to the high success of students in achieving career and graduate/professional school outcomes. Recently, *Investor's Business Daily* (5/27/2011) reported a study by PayScale, which ranked the UIUC campus top among Big Ten universities and 9th in the entire nation on "return on investment," based on the first 30 years of net median pay beyond costs of a college education. Also, in its survey of corporate recruiters, *The Wall Street Journal* (September 13, 2010) lists the campus as the third-highest ranked in the nation for recruiting new employees. Furthermore, UIS is now recognized as one of the top regional public liberal arts universities and UIC is making tremendous strides in its research growth, advances in biomedical sciences, and burgeoning reputation with respect to its urban mission.

Excellence on each campus is contributing to the overall strength of the University of Illinois as a brand and all campuses can leverage the University's strong reputation and the success of its graduates. From admissions view books and web sites to campus tours and recruitment programs, we recommend that communications about the value of a University of Illinois degree be incorporated in messaging and be consistent across all campuses, as a complement to campus-specific highlights and points-of-pride.

We recommend new messages about the value of a University of Illinois degree be developed and marketed both internally and externally.

Recommendation 17: Capitalize on the University's brand in communications to prospective students to emphasize the University as a whole, while retaining strong messages of campus identity.

Recommendation 18: Consolidate the marketing and communications related to enrollment management services across the campuses to both better capitalize on the strength of the University of Illinois brand, while promoting individual campus distinctiveness, strengths, and missions, and reducing costs.

Recommendation 19: Develop mechanisms to share best practices in development of print and e-materials across campuses to identify opportunities to improve campus communications with students, work collaboratively, and manage costs.

Recommendation 20: Incorporate messages about the value of a University of Illinois degree in all messaging in a consistent manner across all campuses, as a complement to campus-specific highlights and points-of-pride.

I. Pathways between the University of Illinois Campuses

Illinois residents seeking a degree from the University of Illinois have three outstanding educational options. However, a University of Illinois student seeking to move from one campus to another is treated more or less as a new transfer student to the University. Although a robust articulation program is available to students transferring from statewide community colleges, this option is not available to the University of Illinois student seeking to transition within the three campuses. Based on our review of student enrollment data, we recommend that the University's campuses create pathway agreements between them and develop a system-wide degree audit program. This recommendation is derived from our review of student migration and enrollment patterns within the three campuses. For example, data from the National School Clearinghouse revealed that over 250 Illinois residents admitted to UIUC chose to enroll at UIC. Any of these students seeking to transfer to either of the other two campuses would be treated as a new student to the University of Illinois.

In addition, pathway agreements can incorporate course- and credit-sharing arrangements for students. We learned that many students pursuing a degree at one campus actually resided in summers and inter-sessions nearer to another campus. Interviewees suggested that students might benefit from the opportunity to take courses at other campuses during their breaks (e.g., decreasing time-to-degree and costs), but transferring credits across campuses was not always easy.¹⁰ Further, in a few cases (such as the College of Nursing), students take courses at one campus (e.g., UIUC), while their degree is taken from another (e.g., UIC). These students cannot easily pursue such lucrative options as a double-major to enhance their subsequent career opportunities. Pathway agreements can help address these barriers to student success and opportunities, while still respecting the curricular oversight of each campus.

To summarize, we believe there should be stronger constituent-friendly options available to University of Illinois students. Implementing such options should strengthen the University of Illinois brand and increase enrollment options for Illinoisans to their University. Such arrangements will also enhance recruitment efforts, ensuring students admitted at one campus the possibility that their success would facilitate transfer later to a preferred campus or perhaps one that offers a major/specialty not available on the campus to which they are initially admitted. These kinds of arrangements can also facilitate course- and credit-sharing across the campuses to improve student outcomes. Furthermore, in our experience (at public research universities), we find that such arrangements generate substantial public and political goodwill and support, as constituents feel reassured that the University is accessible. Therefore, we strongly recommend the University of Illinois create pathway agreements between the three UI campuses. A few examples of these types of pathway programs are available at The Ohio State University, University of Connecticut, and University of Texas.

Recommendation 21: Create pathway agreements between the three University of Illinois campuses to facilitate transfer arrangements as well as course- and credit-sharing.

¹⁰While there is an intercampus registration program (see <http://www.usp.uillinois.edu/InterCamp/InterCampus.cfm>), it is quite onerous, requiring the student to negotiate with the campuses on the transferability/acceptance of credits across the campuses. It also requires students to navigate different offices and procedures depending on the campuses and colleges involved, limits the number of transfer credits, and imposes delays in financial aid. We believe that a more streamlined process that eases a student's ability to take advantage of opportunities across the campuses is both possible and desirable.

IV. SUMMARY & CONCLUSIONS

We're grateful for the time and effort of those who contributed data and insights to us as we examined enrollment management and services at the University of Illinois campuses. We are impressed by the expertise and commitment across all levels and campuses to enhancing these operations, supporting students, and improving their opportunities and outcomes. The University clearly has a strong base of resources at hand to continue to advance its goals in the areas we studied.

We believe, however, that these resources would be better leveraged through stronger sharing and coordination, as well as more clearly articulated strategic goals. While not all of our recommendations (listed at the end of this section) specifically suggest cross-campus coordination, we believe that as a corpus, they do suggest that the greatest opportunity for the University lies in enhanced cross-campus coordination. The University's distinctive campuses, each with unique identities and missions, are its greatest strength. But the potential to truly realize that strength is undermined by a tendency for the campuses to act independently in how they manage enrollment services. Given the need for coordination across the campuses, the University may wish to consider how its organizational structure might be adjusted to enhance coordination in the realm of enrollment management operations. For example, at some institutions with multiple campuses (e.g., The Ohio State University, Pennsylvania State University, University of Connecticut, University of California System, University of Cincinnati, State University of New York System) enrollment management is led by a university officer who works closely with the campus enrollment management teams to set and oversee a University-wide enrollment planning and management agenda that is realized and implemented at the campus levels. At the University of Illinois, moreover, the President's Cabinet, provides another forum for cross-campus oversight and collaboration in the area of enrollment management. We suggest that the University pursue both of these mechanisms.

Once more, we're grateful for the contributions many made to our work. The University of Illinois is already among the nation's and world's greatest institutions of higher learning. Our aim in providing this review is to assist the University in improving the accessibility of its great opportunities to students, enhancing its competitiveness for the best and brightest students, and ensuring that it continues to deliver a superb experience to students to improve their outcomes and future opportunities.

INVENTORY OF STRATEGIC ENROLLMENT MANAGEMENT REVIEW RECOMMENDATIONS

A. Strategic Enrollment Goals

Recommendation 1: Establish strategic enrollment goals for each campus no later than the new fiscal year.

Recommendation 2: Establish a University-wide Projection Enrollment Plan through a collaborative process engaging the President, Vice President for Academic Affairs, Chancellors, Provosts, and Deans.

Recommendation 3: Stabilize freshman enrollment at UIUC; increase transfer enrollment at all campuses; increase international enrollment at UIS and UIC, and grow UIS enrollments to campus capacity.

B. Strategic Diversity Enrollment Goals

Recommendation 4: Establish clear goals with respect to underrepresented students on each campus, which together, map onto University goals.

C. Diversity Recruitment Strategies to Support Strategic Diversity Enrollment Goals

Recommendation 5: Develop a strategic diversity recruitment plan aimed at increasing enrollment for all undergraduate majors, led by a coordinator who would work with admissions and financial aid staff on the campuses.

Recommendation 6: Clearly articulate the roles and authority of campus partners and fully leverage their expertise and access to diverse groups to increase the enrollment of underrepresented students on the campuses.

D. Common Application Consortium

Recommendation 7: Join the Common Application Consortium.

E. Information Systems Supporting Enrollment Services

Recommendation 8: Provide permeable access to the SIS student data at all campuses for authorized staff in the admissions, financial aid, and the registrar offices.

Recommendation 9: Capitalize on the promise of the SIS through a detailed analysis of the current functionality of the system and the future vision of a fully developed CRM to support recruitment and enrollment goals on all three campuses, in conjunction with the University's information technology leadership to generate costs savings in purchase, maintenance, and updating of the systems.

F. Admissions & Financial Aid Operations

Recommendation 10: Adopt a centralized admissions and financial aid processing system.

G. Financial Aid Packaging Philosophy & Scholarship Awarding Practices

Recommendation 11: Retain campus-specific financial aid programs, but encourage stronger partnerships across awarding units to (1) maximize available funds to entering students, and (2) consolidate award communications to the extent possible through a single letter/e-mail.

Recommendation 12: Ensure that tuition decisions are made by the end of February (preferably in January) to allow admissions and financial aid offices to develop and communicate financial aid packages to students.

Recommendation 13: Analyze the cost of attrition to inform packaging formulas, so as to ensure that the financial aid packaging philosophy for each campus is aligned with University and campus enrollment, retention, and graduation goals.

Recommendation 14: Use financial aid modeling tools to assist with determining price sensitivity of new in-state and out-of-state students, with particular models designed to examine needs of Chicago area students.

Recommendation 15: Redesign the current freshman scholarship programs to increase competitiveness in recruiting and enrolling high achieving and diverse students by offering more four-year scholarships and framing communications to highlight a four-year package.

Recommendation 16: The University's enrollment leadership should work with the President and Vice Presidents/Chancellors to increase central scholarship funds and continue building strong relationships with the University of Illinois Foundation and advancements units to obtain more funding for student scholarships.

H. University Brand & Campus Identities in Marketing Messages

Recommendation 17: Capitalize on the University's brand in communications to prospective students to emphasize the University as a whole, while retaining strong messages of campus identity.

Recommendation 18: Consolidate the marketing and communications related to enrollment management services across the campuses to both better capitalize on the strength of the University of Illinois brand, while promoting individual campus distinctiveness, strengths, and missions, and reducing costs.

Recommendation 19: Develop mechanisms to share best practices in development of print and e-materials across campuses to identify opportunities to improve campus communications with students, work collaboratively, and manage costs.

Recommendation 20: Incorporate messages about the value of a University of Illinois degree in all messaging in a consistent manner across all campuses, as a complement to campus-specific highlights and points-of-pride.

I. Pathways between the University of Illinois Campuses

Recommendation 21: Create pathway agreements between the three University of Illinois campuses to facilitate transfer arrangements as well as course- and credit-sharing.

VI. APPENDICES

A. Brief Biographies of Reviewers

Lee H. Melvin is the Vice President for Enrollment Planning and Management at the University of Connecticut. He served as UConn's Director of Admissions for five years and has over 19 years of enrollment management experience. He has worked in diverse educational communities such as Wayne State University in Detroit, MI and three flagship public Universities in Michigan, Georgia and Wisconsin. Lee earned a Bachelor Degree of Music Education from Houston Baptist University and a Master Degree in Vocal Performance from the University of Michigan.

Kedra Ishop, Ph. D., is the Vice Provost and Director of Admissions at the University of Texas at Austin. Her portfolio includes undergraduate and graduate admissions for 16 colleges and schools and management of the university visitor center. She has served in her present role for 18 months and has 12 years experience in university admissions and enrollment management. Dr. Ishop earned her Bachelor's degree in Sociology from the University of Texas at Austin and her Master's and Ph.D. in Education from the University of Texas at Austin.

B. Inventory of Data and Reports Requested

1. Annual Reports
 - a. Admissions, 2006-2010
 - b. Financial Aid, 2006-2010
 - c. Retention Reports, Ten-Year Trend Data

2. Admissions
 - a. Ten-Year Freshman and Transfer Enrollment Trends
 - b. Ten-Year Diversity Enrollment Trends
 - c. Ten-Year International Enrollment Trends
 - d. Guidance Counselor Programs
 - e. Admissions' Enrollment Goals
 - f. In-State Recruitment and Yield Programs
 - g. Out-of-State Recruitment and Yield Programs
 - h. Transfer Recruitment Programs
 - i. High Achievement Programs
 - j. Diversity Recruitment and Yield Programs
 - k. CRM
 - l. Search Process (ACT/SAT)
 - m. Communication Plan (paper/electronic)
 - n. Ten-Year Budget Trends
 - o. SIS (PeopleSoft-Oracle, Banner, Homegrown)
 - p. Customizations to Improve Process
 - q. Campus Partnerships
 - r. Dual Admissions Programs

- s. Faculty Partnerships
 - t. Government Relations
 - u. Athletics Partnerships
 - v. Retention and Graduation Trends (gender, race)
 - w. Competitor Analysis
 - x. Feeder HS and Colleges
 - y. Scholarships Responsibility
 - z. Customer Service Center
 - aa. Application Deadlines
 - bb. Vendors
 - cc. Opportunities
 - dd. Organizational Charts
 - ee. Professional Organizations
 - ff. AP/IB Credit Review
 - gg. International Advance College Credits
 - hh. Social Media Presence
 - ii. Staffing Levels
 - jj. Summer Planning Sessions
 - kk. Major Challenges
 - ll. Price Sensitivity Modeling/Econometric Modeling
3. Financial Aid
- a. Packaging Philosophy: Ten Years of Data
 - b. Pell Grant
 - c. Outreach Programs
 - d. Scholarship Funds

C. Itinerary for University of Illinois and Three Campus Visits: February 22-27, 2011

1. Wednesday, February 23
- a. UIUC Henry Administration Building
 - Richard Wheeler, Interim Vice Chancellor for Academic Affairs/Interim Provost
 - Stacey Kostell, Director of Undergraduate Admissions
 - Keith Marshall, Associate Provost for Enrollment Management
 - Dan Mann, Director of Student Financial Aid
 - Lynnette O'Neal, Director, Principal Scholars Program
 - b. UIS Public Affairs Center
 - Trustee Karen Hasara
 - Tim Barnett, Vice Chancellor for Student Affairs
 - Brian Clevenger, Registrar and Director, Records and Registration
 - Andy Egizi, Program Information Coordinator, Liberal & Integrative Studies
 - Clarice Ford, Associate Dean of Student Services, Diversity Center
 - Jerry Joseph, Director of Financial Assistance

- Kathryn Kleeman, Assistant Director of Admissions
 - Jim Korte, Associate Dean of Students
 - Karen Moranski, Associate Vice Chancellor for Undergraduate Education
2. Thursday, February 24
- a. UIC Administrative Office Building
- Trustee Pamela Strobel
 - Amy Levant, Interim Vice Provost for Academic and Enrollment Services
 - Cecil Curtwright, Assoc. Vice Provost for Academic & Enrollment Services
 - Linda Deanna, Associate Vice Chancellor for Student Affairs and Dean of Students
 - Tom Glenn, Executive Director of Admissions
 - Timothy Opgenorth, Director of Financial Aid
 - Fernando Planas, Associate Director for Recruitment, Admissions & Records
 - William Walden, Special Assistant to the Provost for Diversity
3. Friday, February 25
- a. UIUC Henry Administration Building (By Videoconference from UIC Administrative Office Building)
- Admissions Leadership
 - Stacey Kostell, Director of Undergraduate Admissions
 - Nancy Walsh, Associate Director of Admissions Processing
 - Thomas Skottene, Associate Director of Admissions for Data Services
 - Jamie McFarling, Associate Director of Admissions for Scholar Recruitment
 - Oscar Rodriguez, Assistant Director of Admissions, Chicago Satellite Office
 - Timmi Turley, Assistant Director of Admissions for School Relations
 - College Admissions Deans
 - Renique Kersh, Assistant Dean, Applied Health Sciences
 - Umberto Ravaioli, Senior Assistant Dean, Engineering
 - Julian Parrott, Director, Division of General Studies
 - Mercedes Fernandez, Assistant Dean, Liberal Arts & Sciences
 - Diverse Undergraduate Enrollment Taskforce
 - Trustee Christopher Kennedy
 - Stacey Kostell, Director of Undergraduate Admissions*
 - Oscar Rodriguez, Assistant Director of Admissions, Chicago Satellite Office

- Julian Parrott, Director, Division of General Studies*
- Anna Gonzalez, Associate Vice Chancellor for Student Affairs*
- Lynette O’Neal, Director, Principal Scholars Program*
- Sheri Shaw, Program Coordinator, Applied Health Sciences*
- Wallace Southerland, Director, Minority Student Affairs*
- Regina Stevenson, Manager, Professional Training & Development, CITES*
- Christopher Span, Associate Professor, Educational Policy Studies*
- Umberto Ravaioli, Senior Assistant Dean, Engineering*
- Bill Trent, Professor*
- * Indicates joined by videoconference from UIUC

4. Saturday, February 26

- a. UIUC Henry Administration Building
- Working Session, Debriefing with President Hogan

5. Sunday, February 27

- a. UIUC Henry Administration Building
- Working Session

D. Campus Peer Groups

1. University of Illinois at Chicago

- Florida State University
- Indiana University/Purdue University at Indianapolis
- Stony Brook University
- Temple University
- University at Buffalo
- University of Arizona at Tucson
- University of Alabama at Birmingham
- University of California - Irvine
- University of Cincinnati
- University of Colorado at Denver
- University of Louisville
- University of Minnesota - Twin Cities
- University of Missouri - Kansas City
- University of New Mexico - Albuquerque
- University of Pittsburgh
- University of South Florida - Tampa
- University of Toledo
- Virginia Commonwealth University
- Wayne State University

2. University of Illinois at Springfield
 - Auburn University - Montgomery
 - Clark University
 - College of Charleston
 - Georgia College and State University
 - Iona College
 - Lake Superior State University
 - Marist College
 - Northern Michigan University
 - Shippensburg University of Pennsylvania
 - The College at Brockport
 - Trinity University, San Antonio, TX
 - Union College, Schenectady, NY
 - University of South Dakota
 - University of Wisconsin - Green Bay

3. University of Illinois at Urbana-Champaign
 - University of California - Berkeley
 - University of California - Los Angeles
 - University of California - San Diego
 - University of Michigan - Ann Arbor
 - University of North Carolina - Chapel Hill
 - University of Texas - Austin
 - University of Washington
 - University of Wisconsin - Madison
 - University of Virginia

UIC Senate Recruitment, Admissions and Retention Committee

Meeting of November 10, 2011

2:40 pm

In attendance: Kevin Browne, Rhonna Cohen, John Huntington, Jason Lynch, Rupa Badri Mirmira, Marietta Giovannelli, Chair

The committee began its review and discussion of the implications the report of the External Review Team on Enrollment Management & Services. The focus was the 21 recommendations and what they specifically meant for UIC. Following are the committee's responses embedded in the recommendation:

A. Strategic Enrollment Goals

Recommendation 1: Establish strategic enrollment goals for each campus no later than the new fiscal year.

The committee agrees. However, a problem exists, that is, the legislature's tardiness in producing a budget which will allow us to plan and set goals.

Recommendation 2: Establish a University-wide Projection Enrollment Plan through a collaborative process engaging the President, Vice President for Academic Affairs, Chancellors, Provosts, and Deans.

The committee agrees with this goal and notes that UIC has a well established enrollment plan.

Recommendation 3: Stabilize freshman enrollment at UIUC; increase transfer enrollment at all campuses; increase international enrollment at UIS and UIC, and grow UIS enrollments to campus capacity.

The committee agreed with this recommendation with one caveat – that is, international students must fully understand the funding model.

B. Strategic Diversity Enrollment Goals

Recommendation 4: Establish clear goals with respect to underrepresented students on each campus, which together, map onto University goals.

The committee agrees with this goal and notes that UIC has such clearly defined goals.

C. Diversity Recruitment Strategies to Support Strategic Diversity Enrollment

Goals

Recommendation 5: Develop a strategic diversity recruitment plan aimed at increasing enrollment for all undergraduate majors, led by a coordinator who would work with admissions and financial aid staff on the campuses.

The committee agrees with this goal and notes that UIC has a defined diversity recruitment plan.

Recommendation 6: Clearly articulate the roles and authority of campus partners and fully leverage their expertise and access to diverse groups to increase the enrollment of underrepresented students on the campuses.

The committee agrees with this recommendation.

D. Common Application Consortium

Recommendation 7: Join the Common Application Consortium.

The committee agrees with this recommendation assuming that each campus be considered as a distinct entity with a specific mission.

E. Information Systems Supporting Enrollment Services

Recommendation 8: Provide permeable access to the SIS student data at all campuses for authorized staff in the admissions, financial aid, and the registrar offices.

The committee agrees with this goal and notes that UIC functions with an expanded SIS student data base.

Recommendation 9: Capitalize on the promise of the SIS through a detailed analysis of the current functionality of the system and the future vision of a fully developed CRM to support recruitment and enrollment goals on all three campuses, in conjunction with the University's information technology leadership to generate costs savings in purchase, maintenance, and updating of the systems.

The committee agrees with this goal and notes that UIC currently uses the Banner Enterprise System for SIS.

F. Admissions & Financial Aid Operations

Recommendation 10: Adopt a centralized admissions and financial aid processing system.

The committee is concerned that at present there is a difficulty with this recommendation because UIC's functioning timeline and supportive systems differ from those of UIUC and UIS.

G. Financial Aid Packaging Philosophy & Scholarship Awarding Practices

Recommendation 11: Retain campus-specific financial aid programs, but encourage stronger partnerships across awarding units to (1) maximize available funds to entering students, and (2) consolidate award communications to the extent possible through a single letter/e-mail.

The committee agreed and submitted that UIC would work toward this end.

Recommendation 12: Ensure that tuition decisions are made by the end of February (preferably in January) to allow admissions and financial aid offices to develop and communicate financial aid packages to students.

The committee agrees with this goal and further supports that concept that encourages University Administration to develop a plan to have fees approved earlier

Recommendation 13: Analyze the cost of attrition to inform packaging formulas, so as to ensure that the financial aid packaging philosophy for each campus is aligned with University and campus enrollment, retention, and graduation goals.

The committee agrees that analysis is required, but suggests that research needs to be done to determine this cost.

Recommendation 14: Use financial aid modeling tools to assist with determining price sensitivity of new in-state and out-of-state students, with particular models designed to examine needs of Chicago area students.

The committee agrees with this recommendation. Moreover, the committee argued that we should also examine the needs of rural area students.

Recommendation 15: Redesign the current freshman scholarship programs to increase competitiveness in recruiting and enrolling high achieving and diverse students by offering more four-year scholarships and framing communications to highlight a four-year package.

The committee submitted that this is already in practice at UIC.

Recommendation 16: The University's enrollment leadership should work with the President and Vice Presidents/Chancellors to increase central scholarship funds and continue building strong relationships with the University of Illinois Foundation and advancements units to obtain more funding for student scholarships.

The committee agreed with this recommendation.

H. University Brand & Campus Identities in Marketing Messages

Recommendation 17: Capitalize on the University's brand in communications to prospective students to emphasize the University as a whole, while retaining strong messages of campus identity.

The committee submits that students do not enroll in a system. Students identify a place where they want to attend school. The committee suggested that communications with prospective students should revolve around the array of options they would have at the specific campus at which they plan to enroll.

Recommendation 18: Consolidate the marketing and communications related to enrollment management services across the campuses to both better capitalize on the strength of the University of Illinois brand, while promoting individual campus distinctiveness, strengths, and missions, and reducing costs.

The committee did not agree with this recommendation. The proposal seems a contradiction. Given our response to #17, it would make sense that the ability to control UIC's marketing and messaging should be held by UIC.

Recommendation 19: Develop mechanisms to share best practices in development of print and e-materials across campuses to identify opportunities to

improve campus communications with students, work collaboratively, and manage costs.

The committee agrees with this recommendation.

Recommendation 20: Incorporate messages about the value of a University of Illinois degree in all messaging in a consistent manner across all campuses, as a complement to campus specific highlights and points-of-pride.

The committee agrees with this recommendation, but asked what metrics would be employed.

I. Pathways between the University of Illinois Campuses

Recommendation 21: Create pathway agreements between the three University of Illinois campuses to facilitate transfer arrangements as well as course- and credit-sharing.

The committee agrees that this recommendation reinforces the concept of intercampus synergy which, wherever possible and practical should be a given. The committee submits that an intercampus visitor program similar to the "Traveling Scholars" program should be created. Students would then be able to move from one campus to another to take courses not available at their home campus.

Meeting adjourned at 4:05 pm.

**USC Enrollment Management Task Force
Assessment and Recommendations Regarding
The External Review of University Enrollment Management Report**

University Senates Conference

December 13, 2011

Enrollment Management Task Force

Carol Skalnik Leff, Chair

Michael Biehl

Shahrbanoo Fadavi

John W. Huntington

**USC Enrollment Management Task Force
Assessment and Recommendations Regarding
The External Review of University Enrollment Management Report**

December 13, 2011

The following assessment consists of two components:

- A statement on the faculty role in admissions and enrollment management, which the president requested
- An assessment of the 21 recommendations offered in the external review report of the University enrollment management policies.

I. Faculty Role in Admissions and Enrollment Management

The faculty role in admissions policy and enrollment management operates at the policy level through the faculty Senates. The three university Senates have broad statutory duties assigned in the area of admissions and enrollment in the university statutes as follows:

University Statutes Article II, Section 1, C

Except as otherwise provided in these *Statutes*, each senate shall determine for its campus matters of educational policy including but not limited to: requirements for admission to the several colleges, schools and other teaching divisions; general requirements for degrees and certificates; relations among colleges, schools and other teaching divisions; the academic calendar; and educational policy on student affairs.

The University Senate Conference is also mandated to review and transmit campus senate actions in these areas as well as to take independent action (Article II, Section 2).

The second major body responsible for educational policy is of course the Board of Trustees:

University Statutes, Preamble

The educational policy, organization, and governance of the University as delegated by the Board of Trustees are promulgated in these *Statutes*. When acting on such matters, the board relies upon the advice of the university senates transmitted to it by the President of the University. In these matters each senate has a legitimate concern which justifies its participation in the enactment and amendment of the *Statutes*. The Board of Trustees reserves the power to initiate and make changes in the *Statutes*, but before making any change it will seek the advice of the senates.

Pursuant to this statutory mandate, the University senates have standing policy committees in areas relating to admissions and enrollment management. In the UIUC Senate, the standing committee on Admissions meets with the director of admissions annually and is updated on policy and some operational issues (for example, the installation of the Banner system for admissions). The UIC Senate also has a standing committee on Student Recruitment, Admissions and Retention. The UIS Senate recently

restructured its Committee on Admissions, Recruitment, and Retention which serves as an advisory body to the Office of Enrollment Management.

The faculties have a limited role in the day-to-day operations of undergraduate admissions and enrollment management; in particular, faculty committees participate in "honors programs" selection processes for students who have already been accepted to the university. As examples, on the Urbana campus, faculty committees annually review and accept high caliber students from among those admitted for the Campus Honors Program (Chancellor's Scholars) and the LAS Honors Program (James Scholars). On the Chicago campus, such faculty involvement occurs in the GPPA program in the College of Medicine. Likewise, department faculty participate with department academic staff in student course articulation decisions.

II. Assessment of the Recommendations of the External Review Committee

Executive Summary

It is the conclusion of the USC Enrollment Management Task Force (EMTF) that the most important recommendations contained in the external Enrollment Management Report and those that should be implemented immediately are EM Report recommendations (EMRR) 1, 2, and 12. In summary, EMRRs 1 and 2 call for each local campus to establish (and/or communicate) their 2013 strategic enrollment goals near term, followed by establishment of a University-wide Projection Enrollment Plan through a collaborative process involving the input of key campus academic and University administrative leaders and enrollment managers. It is our conclusion that these activities/recommendations need to be achieved in order for recommendations 3-11 and 13-21 to be effectively implemented. It is only in the context of a collaboratively developed overall plan that the advisability, viability and most effective means of implementing the other recommendations can be evaluated.

It is our conclusion that institutionalizing EMRRs 1, 2 and 12 as a yearly process will be the most valuable and powerful single output of these extensive EM assessment efforts and will allow organizational realization of the primary efficiencies, synergies, and overall EM effectiveness rightly envisioned by the Board of Trustees and President Hogan. To summarize:

- We recommend immediate implementation of EMRRs 1, 2 and 12.
- We recommend collaborative evaluation of EMRRs 3, 4, 5, 6, 9, 11, 13, 14, 15, 16, and 19 in the context of EMRRs 1 and 2.
- We do not support implementing EMRRS 7, 8, 10, 17, 18, 20 and 21 on all campuses in their current form without extensive further collaborative evaluation and revision.

A foremost goal of all EM activities must be the enhanced competitiveness of each campus in relation to its peer institutions. This focus will be most important in raising the profile of the University of Illinois as a whole.

Assessment of Individual Recommendations Regarding The External Review of University Enrollment Management Report

Introduction and Background

At the August 2011 USC meeting, USC Chair Donald Chambers appointed a task force representing the three campuses, charged with assessing the external review of enrollment management in the University of Illinois system commissioned by President Hogan, including the report's twenty-one recommendations. Meetings of the task force were held starting in mid-October, after the final enrollment management report from the external reviewers was received. Conclusions were based on these meetings, the input of campus enrollment management experts, and the reports of the UIC and UIUC campus senate committees, from which much of the USC report was compiled. Ex-officio task force members, USC Chair Donald Chambers and Vice Chair Nicholas Burbules, attended the initial two meetings of the task force, but did not participate in the subsequent meeting and discussions, or in the drafting of this document. The University of Illinois at Springfield representatives to the USC decided to submit their own Senate Report separately, and so did not participate in drafting this report. The UIS report expresses agreement in principle with all 21 recommendations, expresses concern about recommendation 10, and additionally, suggests the value of a cross-campus review of on-line education.

Our intent in this report is to provide a broad overall assessment and comment on the issues identified in the EM Report, and additionally, to identify those EMRRs that we feel are: 1) most critical, needing quick implementation; 2) reasonable, but require careful discussion and further benefit vs. cost of implementation assessment; or 3) viewed as problematic, for various reasons. In order to effectively communicate our views, we frequently will refer to or quote portions of the external EM Report prior to providing our perspectives.

The charge to the external Enrollment Management Review Team was to:

- Examine opportunities to improve recruitment and admissions, particularly when it comes to underrepresented students, non-resident students, and high ability students.
- Identify strategies to streamline, coordinate, and improve efficiencies in recruitment and admissions.
- Evaluate the relationship between admissions and financial aid operations.
- Suggest collaborative strategies to enhance student retention and graduation, and recruitment.

The USC EMTF generally agrees with these activities in principle as they likely reflect the enrollment management strategic goals at most academic institutions. One of the most important aspects of strategic implementation is careful, collaborative discussion among key stakeholders and EM experts at both the campus and university administrative levels to ensure that the benefits of implementation warrant the costs incurred (including opportunity costs) and that current successful EM practices and operations are not harmed. These stated principles assume that stakeholder assessments occur in a timely, professional, productive and non-biased manner and that current practices will be enhanced by the proposed changes.

The external review offered some helpful diagnostics regarding issues of ongoing concern to the campuses, and provided a useful mechanism in Recommendations 1 and 2 to evaluate policy on such issues. It should be noted that the external report was general in its recommendations and did not undertake a cost benefit analysis of the individual recommendations, an analysis that might in some cases vary from campus to campus. In the following assessment, we are unable to perform such a detailed

analysis, but do note, where relevant, some of the cost and benefit concerns that arose during our consultations and deliberations.

Based on discussions we have had with University administrative leadership and enrollment managers, the USC EMTF believes the current enrollment management process is generally highly respected. The EM Report itself states:

“Clearly, enrollment managers on each campus, so far as they understand campus enrollment goals and strategies, are committed to enhancing enrollment (and the educational experience of students) through a competitive admissions process and appropriate financial aid packages.”

That being said, most individuals recognize that there are opportunities for more strategic EM coordination across the campuses that can realize possible synergies and efficiencies and have realistic benefits to both the individual campuses and the University as a whole.

Therefore, it is the recommendation of the USC EMTF that the most important recommendations contained in the external EM Report and those that should be implemented immediately are EMRRs 1, 2, and 12. In summary, EMRRs 1 and 2 call for each local campus to establish and communicate their 2013 strategic enrollment goals near term, followed by establishment of a University-wide Projection Enrollment Plan through a collaborative process involving the input of key campus academic and University administrative leaders and enrollment managers. It is our conclusion that these activities/recommendations need to be achieved before recommendations 3-11 and 13-21 can be effectively implemented. It is only in the context of a collaboratively developed overall plan that the advisability, viability and most effective means of implementing the other recommendations can be evaluated.

EMRR 12 calls for tuition decisions to be completed before February 1 to enable timely financial aid decisions to be made. We welcome the President’s implementation of Recommendation 12 in the current admissions cycle. This EMRR supports the conclusion the USC EMTF has reached from numerous information sources: that financial circumstances, both on the University and student applicant level, have challenged the University and have led to perceived “failures” in enrollment management. The realities of rapidly escalating University tuition relative to public peer institutions, in conjunction with comparatively limited available financial aid and recruiting budgets, place enrollment managers in an increasingly non-competitive position when attempting to recruit both in-state and out-of-state highly qualified, exceptional students. This is not in itself a structural problem, but rather a resource problem. In addition, delayed tuition decisions result in delayed financial aid offerings to prospective students, frequently after enrollment decisions have already been made. It is the strong recommendation of the USC that these financial factors also be a prominent part of any discussions regarding enhancement of the overall enrollment management process.

Our Assessment of the EM Report Recommendations

A. Strategic Enrollment Goals

Recommendation 1: Establish strategic enrollment goals for each campus no later than the new fiscal year.

Recommendation 2: Establish a University-wide Projection Enrollment Plan through a collaborative process engaging the President, Vice President for Academic Affairs, Chancellors, Provosts, and Deans.

Recommendation 3: Stabilize freshman enrollment at UIUC; increase transfer enrollment at all campuses; increase international enrollment at UIS and UIC, and grow UIS enrollments to campus capacity.

As stated above, the USC EMTF strongly believes these are the pre-eminent recommendations contained in the EM Report. With regard to EMRR 1, we feel it is important that the “locus of control” remain with each campus as they are best able to define the appropriate academic composition of enrolled students and therefore, their strategic enrollment goals and targets. The EM Report agrees with this principle stating:

“Given their unique identities and missions, each campus can and should continue to develop admissions criteria and enrollment goals that support its distinctive mission.”

“.....with each campus establishing its own admissions criteria and making its own admissions decisions. This model of locally setting admissions criteria is common at multi-campus universities and we believe it is appropriate for the University of Illinois. After all, the University’s campuses are distinct in mission and, to some extent, in the students and community they serve.”

Once these local strategic goals are established, it is imperative that EMRR 2 occur as a collaborative exercise to enable assessment of potential synergies or conflicts between local campus and/or university goals and strategies. Action Plans for realizing synergies and remedying conflicts can then be jointly developed. Once this collaborative University Projection Enrollment Plan is established, realistic and jointly supportive campus and university EM targets and goals will be better understood, communicated, and where appropriate, will facilitate the most effective implementation of the remaining EMRRs 3-21. As the EM Report states:

“Although each campus has strong enrollment management practices, we noted a lack of clarity regarding enrollment goals. The campus-based enrollment management teams, along with admissions deans in the colleges and schools, expressed a desire for better-articulated enrollment goals in order to guide recruitment and yield strategies.”

“In order to allow for sufficient time to develop and implement recruitment and yield goals, we recommend establishing strategic enrollment goals for each campus as early as possible, and no later than the beginning of the new fiscal year. Doing this early in the recruitment process will allow admissions and financial aid operations time to develop thoughtful and data-driven models critical to building the freshman and transfer student classes. Understanding how enrollment goals are determined would benefit enrollment managers across all campuses. To fully leverage its three campuses, the University might consider developing a University-wide “Projection Enrollment Plan.” Doing so will require collaboration between multiple offices, including the President, Vice President for Academic Affairs, Chancellors, Provosts, and Deans.”

The topics described in EMRR 3 represent an agenda for collaborative discussion once EMRR 1 and 2 have occurred.

It is our conclusion that institutionalizing EMRRs 1 and 2 as a yearly process will be the most valuable and powerful single output of these extensive EM assessment efforts and will allow organizational realization of the primary efficiencies, synergies, and overall EM effectiveness rightly envisioned by the Board of Trustees and President Hogan.

B. Strategic Diversity Enrollment Goals

Recommendation 4: Establish clear goals with respect to underrepresented students on each campus, which together, map onto University goals.

C. Diversity Recruitment Strategies to Support Strategic Diversity Enrollment Goals

Recommendation 5: Develop a strategic diversity recruitment plan aimed at increasing enrollment for all undergraduate majors, led by a coordinator who would work with admissions and financial aid staff on the campuses.

Recommendation 6: Clearly articulate the roles and authority of campus partners and fully leverage their expertise and access to diverse groups to increase the enrollment of underrepresented students on the campuses.

Based on the information we have received, EMRRs 4 and 6 are all already ongoing on the campuses to some degree and generally acceptable dependent on the locus of control. With regard to EMRR 5, our position is that local underrepresented student enrollment targets are best understood and determined by the individual campuses with collaborative, central university coordination so as to realize potential synergies and efficiencies and minimize direct conflicts or negative results. Individual enrollment managers have stated this might be an opportunity to “step back” and see how we can be more strategic in our diversity efforts. The EM Report correctly states:

“A coordinated effort is needed to design a strategic plan to address the diversity aims of the University, its campuses and their schools and colleges. There appears to be good support for such an approach on the campuses.”

The campuses and individual colleges need to make a more concerted effort in this area, and in that context, local efforts will be more effective in achieving diversity goals.

D. Common Application Consortium

Recommendation 7: Join the Common Application Consortium.

We recognize the potential value of this recommendation. However, the move to CAC needs careful evaluation and planning in the recognition that the respective campuses’ timeline for the move would be dependent on local needs and current capacities. Each campus should be considered as a distinct entity with a specific mission and should therefore proceed on a schedule based on these needs and current structure. These points are reflected in the different responses of the UIUC and UIC campuses noted below, each of which seems appropriate for the campus in question. The CAC question is a concrete example of the value of individual campus considerations and discussions in their differing approaches to some EM policy issues.

UIUC

While the UIUC EMTF can understand some of the perceived benefits that might be realized by an academic institution in general with participation in the national Common Application Consortium (CAC), some aspects of participation are conceivably not going to be present in the specific UIUC scenario and applicant pool, and may be clearly and specifically disadvantageous. On November 7, 2011, UIUC enrollment managers attended a day-long conference involving ~40 colleagues from numerous peer universities that are using or contemplating using the CAC. Significant information and institutional

experiences with the CAC were obtained, including some important insights on the costs of implementation. Concerns regarding UIUC CAC participation include:

- Based on peer information, the cost of UIUC CAC implementation would be significant. In addition, aspects of CAC implementation would reverse efficiencies (e.g. less processing personnel) in the UIUC admissions process that have been recently realized (with significant cost investment) in the new Self-Report Academic Record (SRAR) process. Decommissioning SRAR or redesigning it to work in a CAC environment would incur significant additional costs and reintroduce inefficiencies in admissions records processing, including the re-hiring of additional personnel with potentially little/no gain in effective evaluation of applicants.
- One perceived advantage of the CAC is an increase in non-state applicants, especially highly qualified, exceptional students, thereby increasing our overall “selectivity” (e.g. a decreased ratio of admitted students to total applicants) and therefore our national selectivity standing among peer institutions. While the UIUC EMTF agrees that may be a likely outcome, it is not certain and may actually be an additional factor contributing to the UIUC declining enrollment “yield” (ratio of enrolled to admitted students). As the EM report states:

“It’s important to note that in the absence of clear goals, metrics like selectivity and yield have little meaning.”

If the desired significant increase in non-state, highly qualified applicants occurs, it is conceivable that we will be forced to “admit” them due to their exceptional qualifications. However, they will likely not ultimately “enroll” due to no real interest in UIUC, excessive UIUC tuition, our inability to provide competitive financial aid packages, and aggressive recruitment packages and lower tuition that peer institutions are able to offer. This scenario would actually result in a less advantageous impact on selectivity than anticipated (as we would be “admitting” them) and contribute to a continuing decline in “yield” (as we would add to our numbers of admitted students who don’t enroll). Part of the difficulty with emphasizing EM statistics such as these is that they are widely utilized in determining institutional ranking relative to peers.

- The CAC was originally a consortium of East Coast, largely private, academic institutions catering to a different student than those typically found at large, Midwest, public land-grant universities. The latter institutions have only recently joined the CAC. The best strategic option might be to monitor the actual experiences and potential benefits realized by the current Midwest CAC members and UIC prior to investment of the considerable resources necessary for UIUC participation.

In summary, UIUC implementation can only follow an extensive cost/benefit analysis by appropriate EM managers and campus/UA officials. If we are to participate in the CAC it must allow students to clearly select one or more of the UI campuses for admission.

UIC

The UIC EM committee agrees with this recommendation, assuming that each campus be considered as a distinct entity with a specific mission. The existing UIC technical platform and other considerations suggest that the cost-benefit calculus for rapid implementation is more favorable at UIC than at UIUC. On that basis, UIC plans to join the CAC in 2013.

E. Information Systems Supporting Enrollment Services

Recommendation 8: Provide permeable access to the SIS student data at all campuses for authorized staff in the admissions, financial aid, and the registrar offices.

There is concern about whether a cost-benefit analysis will show this recommendation to be advantageous as the costs of implementation may be substantial and raise significant potential conflicts. The latter include: 1) a concern over inappropriate cross-campus recruitment without proper campus/academic department review and 2) federal restrictions on the cross-campus sharing of confidential applicant financial data. Additionally, there are highly focused, expensive, proprietary databases of applicant demographic information that are used by the campuses for recruiting students. The databases used by some campuses may not be appropriate for the others. In addition, these databases may also not be shareable if they are licensed to an individual campus. Cross-campus consultation would also be needed to determine what kind of information is truly useful. These concerns will need to be addressed prior to implementation.

Recommendation 9: Capitalize on the promise of the SIS through a detailed analysis of the current functionality of the system and the future vision of a fully developed CRM to support recruitment and enrollment goals on all three campuses, in conjunction with the University's information technology leadership to generate costs savings in purchase, maintenance, and updating of the systems.

Based on information from UIUC EM leadership, this recommendation has the potential for significant university cost savings, but ONLY if the unified CRM system utilized is the Talisma® system currently employed by UIUC. It is admittedly different from that currently used by UIC and UIS, but it is considered "state of the art" by EM professionals; UIUC could not justify decreasing their current high CRM capabilities and effectiveness for a less advanced system.

F. Admissions & Financial Aid Operations

Recommendation 10: Adopt a centralized admissions and financial aid processing system.

This recommendation is uniformly of major concern to EM officials on the UIC and UIUC campuses for a variety of reasons. The intent and perceived benefits, efficiencies and synergies of the recommendation are understood and agreed to from a centralized processing standpoint. However, it seems EMRR 10 needs significant discussion by EM experts and campus and university officials prior to implementation to identify and solve potential strategic issues and concerns. For example, the committee is concerned that a current difficulty with this recommendation is that UIC's functioning timeline and supportive systems differ from those of UIUC and UIS.

The EM report concludes and we agree:

"Centralizing the current scholarship process is desired by some at the University; however, we recommend the current decentralized program remain in place and encourage financial aid to continue developing strong partnerships with each school or college to maximize available funds to entering students."

G. Financial Aid Packaging Philosophy & Scholarship Awarding Practices

Recommendation 11: Retain campus-specific financial aid programs, but encourage stronger partnerships across awarding units to (1) maximize available funds to entering students, and (2) consolidate award communications to the extent possible through a single letter/e-mail.

Recommendation 12: Ensure that tuition decisions are made by the end of February (preferably in January) to allow admissions and financial aid offices to develop and communicate financial aid packages to students.

Recommendation 13: Analyze the cost of attrition to inform packaging formulas, so as to ensure that the financial aid packaging philosophy for each campus is aligned with University and campus enrollment, retention, and graduation goals.

Recommendation 14: Use financial aid modeling tools to assist with determining price sensitivity of new in-state and out-of-state students, with particular models designed to examine needs of Chicago area students.

Recommendation 15: Redesign the current freshman scholarship programs to increase competitiveness in recruiting and enrolling high achieving and diverse students by offering more four-year scholarships and framing communications to highlight a four-year package.

Recommendation 16: The University's enrollment leadership should work with the President and Vice Presidents/Chancellors to increase central scholarship funds and continue building strong relationships with the University of Illinois Foundation and advancements units to obtain more funding for student scholarships.

We have already described the consensus view that EMRR 12 is critical for any of these recommendations to succeed.

EMRRs 11, 13, 14, 15 and 16 are believed to be reasonable goals and activities that are already ongoing to some degree, but the main questions seem to be “What do they really mean?” and “How do we best achieve enhancements of these activities?” Specifically what practices would be most beneficial, most efficient and derive the most synergies, and at what cost? We return here to our opening observation that the fulfillment of EMRRs 1 and 2 is a prerequisite to informed decisions about whether and how to implement these others. In addition, it is critical that the individual identities and characteristics of each campus and its applicants be appreciated. It is clear that implementation of these recommendations, as with EMRR 10, require further discussion with responsible and knowledgeable campus EM professionals.

H. University Brand & Campus Identities in Marketing Messages

Recommendation 17: Capitalize on the University's brand in communications to prospective students to emphasize the University as a whole, while retaining strong messages of campus identity.

Recommendation 18: Consolidate the marketing and communications related to enrollment management services across the campuses to both better capitalize on the strength of the University of Illinois brand, while promoting individual campus distinctiveness, strengths, and missions, and reducing costs.

Recommendation 19: Develop mechanisms to share best practices in development of print and e-materials across campuses to identify opportunities to improve campus communications with students, work collaboratively, and manage costs.

Recommendation 20: Incorporate messages about the value of a University of Illinois degree in all messaging in a consistent manner across all campuses, as a complement to campus specific highlights and points-of-pride.

The USC EMTF does not agree with the intent of EMRRs 17 and 18. The UIUC Senate report notes: It seems that these EMRR recommendations seem to suggest that in communications to prospective

students, including high achieving, exceptional individuals, the UIUC would position itself as only one distinctive campus of the greater University of Illinois. Based on the information we have received, this is not the EM practice of other highly ranked peer institutions (e.g. the University of Texas at Austin, the University of Wisconsin at Madison, the Ohio State University) and is not believed by enrollment industry experts to be an effective and productive strategy, especially with high achieving students... UIUC also has an existing distinct and favorable national and international reputation which is effective in attracting both out-of-state and international students, especially high achieving students. It would be counterproductive to dilute this existing, recognized UIUC 'brand' in order to establish an overall University "brand."

We fully endorse the message that the University of Illinois is a premier academic institution that can appeal to ALL prospective students in the state of Illinois and elsewhere through three individual campuses with distinctive strengths, missions, and student characteristics and needs. However, students do not enroll in a "system." There is a place for everyone on one of the campuses at the University of Illinois, but we must highlight the distinctiveness of each campus. The committee suggests that communications with prospective students would be more effectively targeted if they revolve around the options they would have at the specific campus at which they plan to enroll. We feel strongly that distinct UIUC recognition and strength should be maintained and fostered, albeit in association with the existing UIC and UIS "brands," and development of a broader message recognizing and communicating the overall excellence of the University of Illinois as a whole. We agree with the EM report which states:

"These identities are important to the campuses and to the overall strength of the University as a whole. They are also an asset in recruiting students because, when approached as a whole, they allow the University to address a broad variety of student needs and interests... .. Each of the University's campuses has different admissions criteria, which provides opportunity for a highly prized University of Illinois degree for any qualified student."

We recognize that the differentiation between our perspective and EMRR 17 might be viewed as subtle by some, but we feel the message, and especially the emphasis, are critically important and distinctive.

With regard to EMRR 18, capitalizing on the University of Illinois brand while still emphasizing the distinctive identities of the campuses presents some potential contradictions that may blur the message. The individual campuses may best be able to define effective marketing and messaging strategies. According to information provided to the UIUC committee by campus EM professionals, the current UIUC marketing and promotions efforts are considered exemplary within the industry. UIC is working on further development in this area. It is desirable, however, to facilitate collaborative discussions between campus EM professionals and university officials to more strongly incorporate the overall University message while not losing the distinct campus brands. Useful synergies and learning can emerge from these consultations.

ERMM 19 is generally believed to be a valuable recommendation regarding the enhanced sharing of best communications and marketing practices between campuses. Any efforts to share best practices to improve the EM successes, efficiencies and reduced costs of each campus and therefore the University as a whole is advantageous and should be encouraged. As the EM Report states:

"We believe that the path to such improvements lies in greater sharing and coordination of best practices, resources, and information systems across the campuses."

EMRR 20 raises concerns in relationship to ERMM 17 and 18. It is significant that this issue is one that UIUC students and alumni seem to be most concerned about. The position embraced by these individuals and most faculty is that degrees are conferred by the faculty of each campus. UIUC students and alumni

are emphatic that their degrees are distinct from those conferred by other campuses. UIC also agrees that this recommendation could present a problem in highlighting the individual identities and strengths of the campuses.

I. Pathways between the University of Illinois Campuses

Recommendation 21: Create pathway agreements between the three University of Illinois campuses to facilitate transfer arrangements as well as course- and credit-sharing.

The committee agrees that the concept of intercampus synergy that this recommendation endorses is a valuable aim to pursue wherever possible and practical. A properly implemented set of measures for the promotion of course- and credit-sharing is likely to enhance and enrich the student experience on all campuses. However the first part of the recommendation regarding facilitating transfers is problematic. There are already processes in place to facilitate student transfer and course articulation between the campuses. UIC, for example, is already the #1 four-year “feeder” school for UIUC. Without question these can be improved and streamlined; for example, there is a major effort at UIUC to reduce the time it takes to have courses reviewed and approved for transfer. If “facilitate” means to streamline and simplify these processes, we can support this recommendation; however, if “facilitate” means removing barriers, such as reducing the campuses’ ability to selectively screen transfer students and/or evaluate courses for equivalent transfer, then it is problematic. The proper basis for these judgments must rest in colleges and departments that best know their requirements and course content. This argues for such decisions to be held closer to the level of faculty expertise, rather than creating additional levels of review distanced from faculty.

It should be noted that comprehensive course articulation agreements with junior colleges are less problematic as such agreements do not negatively impact graduation and retention rates of individual University campuses like agreements between campuses would.

Summary

In conclusion, we embrace the overall goals of making our enrollment management processes more efficient and effective in serving individual campus and overall University interests. We agree that these activities can likely benefit from some level of strategic central coordination and more extensive campus-to-campus collaboration in order to realize possible synergies and efficiencies which would have realistic benefits to both the individual campuses and the University as a whole. We also agree with the goal of being even more aggressive in recruiting students in an increasingly competitive, higher education marketplace, especially as it pertains to the most academically talented students and those students who add intellectually and socially valuable diversity to our student population. The greatest single impediment to improving our performance in this area is a lack of adequate financial aid, and any proposals must be evaluated in relation to costs that divert resources away from this primary area of need.

Many of the recommendations contained within the External Review of University Enrollment Management Report may have potential benefits. However, we believe the primary, over-arching EM Report recommendation was clear; specifically, to initiate collaborative and broad-based planning and goal-setting processes with regard to enrollment management. Central University Administration coordination through an Executive EM Director may help achieve this goal, but only after the campuses, along with University administration, have identified key goals, targets and synergies through a collaborative and broad-based discussion and agreement. As the EM Report states:

“We believe, however, that these resources would be better leveraged through stronger sharing and coordination, as well as more clearly articulated strategic goals. The University’s distinctive campuses, each with unique identities and missions, are its greatest strength. But the potential to truly realize that strength is undermined by a tendency for the campuses to act independently in how they manage enrollment services”.

In that regard and in that spirit, it is the strong recommendation of the USC EMTF that the most important recommendations contained in the external EM Report and those that should be implemented immediately are EMRRs 1 and 2, which call for each local campus to establish and communicate their 2013 strategic enrollment goals near term, followed by establishment of a University-wide Projection Enrollment Plan through a collaborative process involving the input of key campus academic and University administrative leaders and enrollment managers. We have outstanding expertise on our campuses, and any review process will benefit from involving those individuals and their viewpoints on what can work, what can work better, and what won’t work within our system. The evaluation of these recommendations should also be informed by a review of “best practices” at peer institutions. It is our conclusion that these activities/EMRRs 1 and 2 need to be achieved before EMRRs 3-11 and 13-21 can be effectively implemented. It is only in the context of a collaboratively developed overall plan that the advisability, viability and most effective means of implementing the other recommendations can be evaluated.

Therefore, to summarize:

- We recommend immediate implementation of EMRRs 1, 2 and 12.
- We recommend a collaborative evaluation of EMRRs 3, 4, 5, 6, 9, 11, 13, 14, 15, 16, and 19 in the context of EMRRs 1 and 2.
- We do not support implementing EMRRS 7, 8, 10, 17, 18, 20 and 21 in their current form on all campuses without extensive further collaborative evaluation and revision.

A foremost goal of all EM activities must be the enhanced competitiveness of each campus in relation to their peer institutions. This focus will be most important in raising the profile of the University of Illinois as a whole.

From: Allen-Meares, Paula

Sent: Monday, December 12, 2011 5:16 PM

To: 'Kenneth Thomas'; Browne, Kevin; Opgenorth, Timothy; Chambers, Donald; Deberry-Spence, Benet; Erricolo, Danilo; Ghosh, Siddhartha; Gibori, Geula; Hilbert, David; Kay, Brian; Kelley, Michele; Mohammadian, Abolfazl; Negrusz, Adam; Patena, Karen; Patston, Philip; Persky, Joseph; Schwartz, Alan; Shanahan, Timothy; Vincent, Catherine; Weller, Ann; Azar, Dimitri; Bauman, Jerry; Bottoms, Bette; Brandt-Rauf, Paul; Case, Mary; Chou, Victoria; Fernhall, Bo; Gillet, Henri; Graham, Bruce; Hairston, Creasia; Kirshner, Judith; Nelson, Peter; Pagano, Michael; Tantillo, Astrida; Weaver, Terri

Cc: Hogan, Michael; 'Troyer, Lisa'; 'chpierre@uillinois.edu'; ghosha@uillinois.edu; 'pmwise@uillinois.edu'; 'koch@uis.edu'; Kaufman, Lon; Henley, Barbara

Subject: Enrollment Management

Dear Colleagues:

I write to update you regarding the status of Enrollment Management plans for the University of Illinois. President Hogan has recently convened meetings with the three campus Chancellors and the Vice President for Academic Affairs to discuss his and the Board of Trustees' support, thoughts and plans to implement the recommendations of the Enrollment Management report. In these meetings, the President has assured us that:

- 1) Faculty and deans will continue to play the same role going forward as they have played in the past in terms of Enrollment Management.
- 2) There will be an Enrollment Management Policy Council, convened by the Vice President for Academic Affairs and will include the Provost. The EMP Council will recognize the uniqueness of each campus.
- 3) The Chancellors will interview candidates for the Executive Director of Enrollment Management position.
- 4) Financial aid dollars would not be removed from the campus. However, it will be part of the campus operations that report to the Executive Director of Enrollment Management.

The UIC Enrollment Manager will have a dual reporting line with a primary report to the Executive Director of Enrollment Management and a secondary report to the Provost.

We will keep you informed as we implement the recommendations of the Board of Trustees and the President. This is clearly an important transition for the university, one that requires thoughtful consideration and careful planning.

Paula