

Enrollment Task Force Report

January 18, 2008

Introduction

The importance of enrollment management is obvious. The very nature of the Case Western Reserve University community is significantly determined by the characteristics of our students. The academic credentials, experiences, and backgrounds of the students we recruit, admit, enroll, and graduate help define the University for the present and the future. In addition, as a tuition dependent institution, the net tuition revenue generated by student enrollments is vital to the fiscal viability of the University.

The Enrollment Task Force has identified six critical areas for consideration relative to enrollments.

Shaping the Class

Recommendations:

- 1) The characteristics of the student body are significant determinants of the Case Western Reserve University community. We need to articulate the identity and values of Case and ensure that the student body reflects that identity and those values.**
- 2) Determine whether the current academic program profile for the undergraduate student body reflects our identity and values.**
- 3) Investing in recruiting, enrolling and graduating a diverse student body is a high priority.**
- 4) Ensuring that Case Western Reserve University remains affordable through cost containment and additional financial aid is a high priority.**
- 5) Internationalizing the University is a high priority, which requires an investment in recruiting and financially supporting international students.**
- 6) If we are to benefit from an intentional approach to shaping the class, we must determine priorities in the composition of the student body and invest resources accordingly. If we determine that we are unable to meet our goals relative to shaping the student body as a result of being constrained by the resources available to us, we must work to position the University so that we can choose from among a number of viable options, not just determine priorities within constraints.**

As we consider the future, we must be intentional in our efforts to shape the student body if we are to enhance the powerful learning community at Case, ensure our students are prepared and engaged to serve humanity, and meet University-wide goals. We must consider shaping the student body with an understanding of the dynamics associated with how the class changes over time due to students changing majors and attrition.

There are many factors to consider when determining the profile of the class, which include size, ethnicity (broadly defined), geography (local, regional, national and international), gender, culture, quality, and academic profile by college, school, and program.

There are also many factors that influence decisions about shaping the class to meet the desired profile, which include characteristics of the inquiry pool, characteristics of the applicant pool, financial aid, merit vs. need-based aid, affordability, access, tuition revenue, facilities (classroom space, performance space, laboratory space, and housing), faculty, faculty services, and student services. Unfortunately, many of these factors act as constraints when resources are limited.

What is the optimal composition of the student body to create the learning community we believe should embody a Case education and what are the implications of meeting that profile? The dynamic relationships among factors to consider in determining the profile of the class and the factors that influence decisions about shaping the class to meet that profile are critically important and sometimes competing. If we are to benefit from an intentional approach to shaping the class, we must determine priorities in the composition of the student body and invest resources accordingly. If we determine that we are unable to meet our goals relative to shaping the student body as a result of being constrained by the resources available to us, we must work to position the University so that we can choose from among a number of viable options, not just determine priorities within constraints.

The characteristics of students enrolling at Case should reflect the educational community we strive to create. We strongly recommend that through the strategic planning process we determine/articulate our identity and values and ensure that the student body reflects that identity and those goals. Whether we are discussing undergraduates, graduate or professional school students, the profile of the student body is a critical determinant in the quality and diversity of a Case education.

For the freshman class, we believe we must make a decision about the academic profile of the class knowing there are mixed opinions about what that profile should be. Case has long been known for strong programs in engineering and science. There are those who believe there should be more emphasis placed on the humanities and social sciences. With the size of the freshman class being fixed at 1,050, enrolling more students in the humanities and social sciences would require enrolling fewer students in engineering and science majors and shifting/increasing resources aimed at recruiting and enrolling students in the humanities and social sciences. In order to craft a sound recruitment strategy, we must be certain we are working to recruit and enroll students with the right mix of characteristics to build the learning community at Case. Increasing the number of undergraduate applications has been identified as a strategy to reach this goal. However, it is important to increase applications from among the right prospective students with the right characteristics, and until we answer the question concerning academic profile, we cannot be as intentional in our efforts.

Diversity, broadly defined, is also a high priority, whether we are recruiting and enrolling undergraduates, graduate students, or professional students. A commitment to programs like the Cleveland Scholarship Program for undergraduates and increased funding for the recruitment of a diverse student body at all levels are critically important.

Affordability for students is also a high priority. Talented students should not be excluded from earning a Case degree based on cost alone. We highly recommend that funding for financially needy students be a priority.

Internationalizing the University is also a high priority. We are living in a global society and Case students benefit from experiencing global viewpoints. Additional resources should be

made available to recruit, enroll and provide financial aid for international students. Although still a priority, international students comprise a larger percentage of graduate and professional school enrollments than undergraduate enrollments. If we are to increase the percentage of international undergraduates, we must invest resources for recruiting abroad so we are able to build relationships important to the success of international recruitment. It is also critically important to create an environment in which international students feel welcomed and included.

Financing an Education

Recommendations:

- 1) In order for Case Western Reserve University to be competitive in recruiting, enrolling, and graduating the most talented undergraduate, graduate and professional school students and to meet University goals for shaping a student body reflecting our institutional values, we must increase the funded gift aid available for financial aid.**
- 2) Exploring investing University gift aid to address equity in funding for graduate and professional students across programs, colleges, and schools is a priority.**
- 3) We must continue to exercise cost containment as a way to keep a Case education affordable.**

Financing an education is at the forefront of the higher education conversation and is one of the most significant challenges facing institutions across the country. It is difficult to open a newspaper or listen to the evening news without hearing about the escalating cost of higher education, concerns relative to access and affordability for low-and middle-income families, and concerns over the use of merit vs. need-based financial aid.

The difficult issues affecting financing an education are exacerbated by the fact that as college costs have increased, federal and state support for financial aid has, for the most part, decreased or remained constant. Certainly, the buying power of federal and state gift aid has diminished significantly with increasing costs. And, the loan debt assumed by students has also increased with the increased cost of a higher education. The average loan debt of graduates has become an important criterion in how institutions are judged and has also become a factor in student retention and graduation.

From the perspective of colleges and universities, the amount of tuition revenue used to support institutional gift aid has steadily increased. This discount on tuition has increased as the competition for students with the strongest academic credentials has become fierce. Enrolling talented students is at the top of everyone's list for the community they create, but also for the influence high standardized test scores have on reputation and ranking.

Funding for students at all levels, undergraduate, graduate and professional, must be a high priority for Case. If we are to remain competitive, we must be able to attract the best and brightest and remain affordable. We must be able to balance the merit and need-based components of our financial aid strategies, while working to minimize loan debt.

Undergraduates

As the financial need of Case undergraduate students has increased, we have experienced increased burden on institutional gift aid in our effort to keep loan debt as low as possible. Also, as the size of the freshman class has increased in combination with increased financial need, the buying power of our merit scholarships has decreased, and we are no longer able to award all students eligible for merit aid. For example, the Trustee Scholarship, awarded to undergraduates with the strongest academic credentials, has been reduced from 100% of tuition to 80% of tuition, and we currently only award about half of the freshmen students who meet the academic criteria to receive the award, down from 100%.

Reacting to a national outcry concerning access and affordability for low-and middle-income students, a number of institutions are implementing no-loan policies in awarding financial aid for families in certain income ranges. These financial aid policies/strategies will allow primarily low-income students to graduate with no loan debt. These programs are sorely needed and admirable, but come at high cost. Many of the institutions implementing no-loan policies have the endowment to defray the cost without using tuition revenue. At Case Western Reserve University, we are not in that position. The no-loan policies implemented at other institutions do, however, have an impact on our ability to be competitive, as families expect us to follow suit.

When recruiting undergraduates, we are already disadvantaged given our financial aid funding structure. Only approximately 14% of Case gift aid is endowed, leaving 86% funded through tuition revenue. That puts us near the bottom of the list among peer institutions. Increasing endowed financial aid through fund raising is a critical need, and the Enrollment Task Force strongly recommends placing student scholarships and grants as the highest priority in the next capital campaign. We must also continue to exercise cost containment to keep tuition increases as low as possible given the impact on the cost of an education, but also given the increased scrutiny from Congress relative to college costs. And, we must continue to work to identify other external sources of funding for students.

Graduate and Professional Students

The funding of graduate and professional school students presents similar challenges as undergraduate funding, in that programs unable to provide sufficient financial support are often unable to recruit the most talented students.

The funding challenges at the graduate level are most starkly seen in the arts, humanities and social sciences where graduate students often need to obtain numerous teaching assignments, outside employment, and/or secure personal loans in order to make ends meet. The inability to fully fund graduate students in these disciplines creates a “have vs. have not” status among graduate students, particularly as one examines the stipend levels of graduate student stipends in the sciences and engineering compared to those in the arts, humanities and social sciences.

The need to finance graduate education in the arts, humanities and social sciences with additional teaching assignments, outside employment and loans is linked to a longer time to degree which only magnifies these issues for students. While the arts, humanities, and social sciences face challenges of adequately financing graduate students, the sciences and engineering disciplines have faced challenges as the result of the decline in the availability of outside funding from

government agencies such as the NSF and NIH. The current trend in funding means a decrease in the number of available training positions.

The Enrollment Task Force believes that the University should make strategic investments in the creation of an endowment fund that would support graduate and professional student fellowships at the University level. These competitive university fellowships would significantly enhance our departments'/schools' ability to attract the most talented students.

Finally, we need to work harder as a University to help students understand the power and value of a Case Western Reserve University degree and how being part of the Case community, and the value of a Case degree, last for a lifetime. A Case degree is an investment in the future, and we need to ensure we are all sharing that message.

Facilities

Recommendations:

- 1) Ensure that facilities support strategic decisions regarding the profile of the student body, including classroom space, laboratory space, performance space, practice space, housing, and other facilities needs.**
- 2) Determine if on-campus housing for graduate and professional school students will help Case meet strategic enrollment goals.**

The Enrollment Management Task Force believes that facilities play a critical role in the ability of the University to effectively implement other enrollment goals. Most notably, as the University sets priorities in strategically shaping the characteristics of incoming classes, we must have the facilities in place to support the students we aim to recruit.

The main facilities needs set forth by the President's Commission on Undergraduate Education and Life continue to be important to sound University development, including increasing laboratory, performing arts, and classroom space, and an enhanced student center. The Task Force also believes the planned "College Town" will also enhance the social experience. As priorities are set for shaping the class, the Task Force believes that facilities priorities will naturally follow.

In addition, while many of the residential needs identified by the PCUEL have been met by the construction of the Village at 115, the Task Force has identified two residential issues that warrant additional consideration. The first is for an examination of our current student housing to see if it is appropriately situated to meet the needs of a culturally-inclusive student population. Again, specific priorities in this area will flow from the needs of our current student population and the goals set for the incoming class in terms of gender, race, nationality, disability status, etc.

The second area identified by the Task Force is the potential need for the University to provide on-campus housing opportunities for graduate and professional school students. Although the area surrounding the University provides reasonably priced housing options, the lack of on-campus housing may discourage matriculation by graduate and professional school students unfamiliar with the City of Cleveland generally and University Circle area specifically. These students often cite concerns about safety and convenience when noting the lack of on-campus

housing options. Meeting these concerns would potentially enhance the effectiveness of recruiting efforts outside of the immediate region.

Branding

Recommendations:

- 1) We recommend investing resources to determine what makes Case Western Reserve University distinctive at the University, college, professional school, and program level and leverage that distinctiveness to recruit and enroll students.**

When it comes to enrollment management our institution's branding is essential to the successful recruitment of students, faculty and staff. Without a clear picture of what our institution establishes as its *mission, vision*, and espouses to deliver to the local, national, and global community, enrollment management will not have the tools it needs to capture the market we hope to attract. All branding efforts need to be consistent and support the University's mission. Branding allows an institution to build a reputation based on how they want to be perceived, valued, and uniquely placed within their chosen educational arena. A strong university branding campaign also allows the various schools and programs within the university to stretch tight marketing budgets. The more recognizable the university "brand," the more successful individual marketing efforts are likely to be.

Branding provides enrollment management with the tools to:

- Market their institution, school or program to the rest of the world on what they provide and believe to be important
- Recruit the best students, faculty and staff
- Create a student, faculty, and staff profile/fit
- Consistently have students leave with a common world responsibility or transformational experience (examples - lifelong scholar, global active citizen, and ethical leader)
- Create a unique public relations campaign/publicity
- Determine what makes Case Western Reserve University distinctive
- Have alumni market, support, and be proud of their alma mater

Sharing Recruitment Expertise and Resources

Recommendations:

- 1) In order to be more efficient and effective in our recruitment activities University wide, we recommend establishing a recruitment council composed of enrollment management representatives from across all levels of the University to determine how sharing resources, expertise, and best practices can improve our collective recruitment efforts and help us better communicate the many opportunities available to students at the undergraduate, graduate, and professional school levels.**
- 2) We recommend a careful review of information technology resources, especially in light of the PeopleSoft implementation, to determine how systems integration might lead to more efficient and effective recruitment across all levels and enhanced customer service.**

- 3) The University's web presence plays a critical role in our ability to communicate the benefits of a Case education and to recruit students. We strongly recommend the development of a consistent web presence for recruiting designed to take full advantage of the most current recruiting technologies. Our web presence must accommodate differences across programs but must also be consistent in design so as to provide a one University look and feel.**

In addition to shaping the class, branding and marketing, and funding, the Enrollment Task Force has identified sharing resources and expertise in our recruitment efforts as an additional key area of opportunity for potential collaboration and strategic investment.

Currently, recruitment of prospective undergraduate, graduate and professional students occurs in different ways depending on the school and/or academic level. Methods such as web sourcing, predictive modeling, attendance at recruitment fairs, and the establishment of diversity recruiting positions are some examples of methods used at Case Western Reserve University to recruit the best and brightest students. The Enrollment Task Force recommends that there be an effort to look at ways that recruitment activity and/or processes could be done more collaboratively. The Task Force recognizes the distinctive needs of each school/program, but also believes there is a great deal of benefit in examining key issues such as the need for a collaborative web presence, collaboration on key recruitment fairs, and establishing a University-level recruitment commitment to share best practices and/or other resources.

The Enrollment Task Force believes the University should seize the opportunity to better educate prospective students to all of the possible academic, research, and experiential opportunities at the undergraduate, graduate and professional levels. Based on the numerous strengths we have in these areas, we believe that this would be a distinct advantage.

Changing Demographics – High School Graduates

Recommendations:

- 1) Invest additional resources in out-of-state recruitment and enhance our Alumni Admissions Program in key out-of-state markets.**
- 2) Explore the potential/implications of enrolling additional transfer students through the establishment of articulation agreements and binary programs.**
- 3) Explore the potential/implications of enrolling non-traditional students.**
- 4) Continue to reinforce the importance of a community based approach to recruitment and yield enhancement.**
- 5) Continue to develop our yield enhancement initiatives.**

Although this topic has immediate implications for undergraduate enrollments, it has long-term implications for all levels of enrollment at Case. The National Center for Education Statistics predicts a 5% increase in the number of high school graduates nationally between 2003-04 and 2016-17, with peak enrollments occurring in 2008-09. This follows a 24% increase in high school graduates between 1991-92 and 2003-04.

Changes in the number of high school graduates are projected to vary significantly by region between 2003-04 and 2016-17, with a 15% increase in the South, a 12% increase in the West, a

1% increase in the Northeast and a 4% decrease in the Midwest. Ohio is expected to see a 6.3% decrease in high school graduates and neighboring states will not fare much better.

Most of the increase in high school graduates will occur in a few states in the West and South. Nevada is expected to see a 68% increase in high school graduates, Utah a 45% increase, Arizona a 43% increase, Florida a 33% increase, and Georgia a 28% increase.

This development creates a significant challenge for colleges and universities as the competition for students becomes more intense. The profile of high school graduates will change as well, with more students of color, more first generation, more underprepared, and students from families with lower incomes. As a result, affordability, culture, and family will play a significant role in our efforts to recruit students to Case. It will be much more difficult to recruit and enroll students from the highest growth areas of the country.

It is imperative that we plan now for the projected decline in the number of high school graduates in the Midwest and Northeast. We must continue to focus our efforts on yield enhancement through targeted contact with prospective students, financial aid, and a community-based approach to recruiting and enrolling students who will contribute to the learning environment at Case.

We must also explore the possibility of other potential sources of students. Currently, we do not invest heavily in transfer student enrollment. It is recommended that we consider whether to invest significantly in establishing articulation agreements with community colleges, establishing additional binary programs, etc., to increase transfer student enrollment.

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