

Building a Solid Admissions and Financial Aid Partnership



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Presented by:

James Scannell, Scannell & Kurz, Inc.

Lee Melvin, University of Connecticut

Scott Shoemaker, Point Loma Nazarene University

Why is a Partnership Important in Today's Marketplace?

- n Competing effectively
- n Communicating affordability
- n Providing excellent customer service
- n Developing mutually supportive processes
- n Ensuring strategies that support enrollment growth

Today's Agenda

- n 10 Principles
- n 2 Examples



#1 No Second-Class Citizens

- n Mutual respect
- n Reporting lines less important than good communications



#2 Shared Goal Setting

- n Admission's goal is not just the number and mix of students.
- n Financial Aid's goal is not just staying in budget.
- n Focusing on NTR brings the two together.

#3 All Gift Aid Is Green!

- n Fine if the admission staff does merit award decisions and the financial aid staff awards need-based funds but collaboration and coordination are key.
- n Fine if the financial aid staff awards all institutional aid but goals need to be shared, understood, and agreed upon.
- n Not fine for awards given for different purposes (merit vs. need vs. performance vs. entitlement) to be given in isolation of how the whole package comes together.



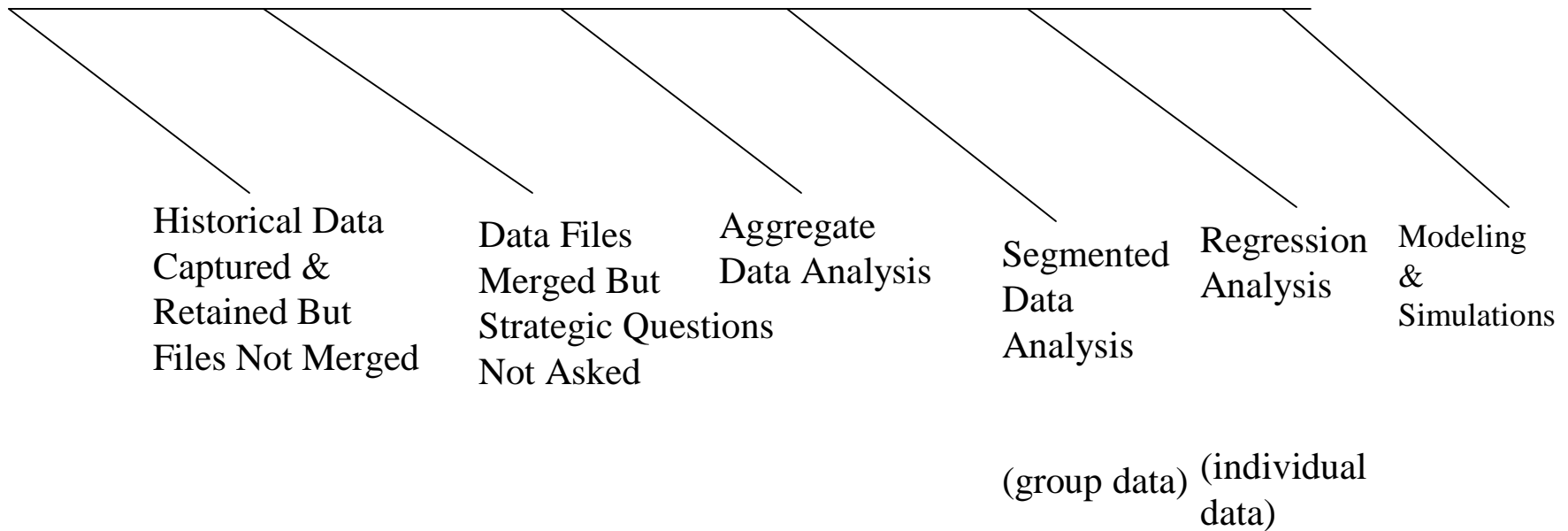
#4 Merge Data Files

To use data to drive decisions must
have admissions and financial aid files
merged.

Data Analysis Progression

No Data

**Strategic Use
Of Data**



#5 Financial Aid Data Needs to Help Build the Case for Affordability

- n Can't "run for the hills."
- n Can't just focus on process.
- n Must help families "see themselves" at the institution.

#6 Neither Office is Focused on Just New Freshmen!

- n Transfers receive timely, appropriate packages.
- n Retention targets are acknowledged as just as important as new student targets.



#7 Service to Students is JOB #1

- n Neither the admissions nor financial aid office is adding unnecessary steps to the process.
- n Communications (content as well as timing) are fully coordinated and complementary.
- n Cross training on critical dates and processes, FAQ, etc. is updated semi-annually.



#8 Both Voices at the Table

Leadership of both admissions and financial aid offices should have a “seat” at the pricing, budgeting, and enrollment planning table.

#9 Support, Don't Compete, for Resources

- n Neither office can succeed without the other.
- n Consider shared positions.
- n Sometimes best investment in your success is in another office.

#10 Make Success (or Failure) a Shared Event

- n Joint celebrations
- n Joint review process



Example #1

University of Connecticut



University of Connecticut Profile

- n Top Public University in New England
- n Fall 2006 Total Enrollment: 28,000 +
- n Storrs, 5 Regional Campuses, Law School, and Health Center
- n Decade of Transformation
- n \$2.3 Billion State Investment

Enrollment Management Division Structure

Office of the Vice-Provost

Student
Financial Aid

Undergraduate
Admissions

Registrar

Incoming
Student
Orientation

Student
Retention/
Graduation

Customer
Relationship
Management



Enrollment Management Mission Statement

Our Division's mission is to recruit, enroll, retain and graduate students who show outstanding academic potential. Through a strategic and data-driven approach, the Offices of Admissions, Financial Aid, Orientation and Parent Programs, and Registrar work as a team to ensure University success in improving the academic profile, enhancing diversity, and meeting University budget goals.



State Mandates

- n Stop the “Brain Drain”
- n Create a “Brain Gain” for state of Connecticut



There are No Second-Class Citizens

n Coaching

n Teamwork

n Mentoring



Get the Right People on the Bus

- n Get the wrong people off the bus
- n Get the right people in the right seats on the bus
- n Support good people

From: Good to Great Why Some Companies Make the Leap... and Others Don't, by Jim Collins, 2001, Harper-Collins Publishers, Inc.



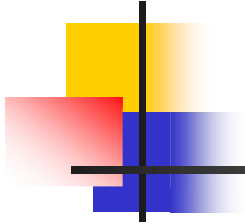
Goal Setting and Accountability

- n Shared process
- n People support what they help to create
- n Seat at the table



Honesty and Integrity

- n Shared Vision
- n Shared Resources
- n Shared Success!



Example #2

Point Loma Nazarene University



Point Loma Nazarene University

- n Admission and Financial Aid reporting lines are different.
- n Enrollment Management Operations Committee helps create a unified vision.
- n Challenge of perceived affordability at a private institution.

Model Development: Personality or Function

- n “Early adopter” of Enrollment Management structure, but not philosophy
- n Senior leadership changes prompted realignment of Admission, Financial Aid, and Retention under separate VPs



Recognition is Key

- n Important for all offices to recognize efforts on behalf of each other.
- n Commitment to common ideals and purposes is discussed at individual and joint training sessions.
- n Decisions affecting students are made corporately whenever possible.



Opportunities for Collaboration

- n Student Financial Services presentations at Admissions events
- n Regular meetings between leadership of both offices
- n Physical proximity promotes a unified front
- n Openness and service orientation leaves a lasting impact on students and parents.



Discussion

How do you build a team at your institution?