

REQUEST FOR PROPOSAL

Enrollment Project

*Louisiana Board of Regents
Baton Rouge, Louisiana*

Proposal prepared by
Thomas E. Williams
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Louisiana Board of Regents • Baton Rouge, Louisiana

Overview

Noel-Levitz is pleased to respond to the Louisiana Board of Regent's Request for Proposal to assist in developing marketing and recruitment plans for Louisiana's 13 statewide and regional universities, conducting systemwide market research, and assessing the Louisiana Technical College's (LTC) enrollment management potential. The thirteen statewide and regional universities include: Louisiana Tech University, University of Louisiana at Lafayette, University of New Orleans, Grambling State University, Louisiana State University in Shreveport, McNeese State University, Nicholls State University, Northwestern State University, Southeastern Louisiana University, Southern University and A&M College, Southern University in New Orleans, University of Louisiana at Monroe, and Louisiana State University at Alexandria. Given Noel-Levitz' successful history of executing similar initiatives, we are confident that we can meet these project specifications and exceed the Board's expectations.

After carefully reviewing the results from the *Systemwide Strategic Enrollment Analysis*, the *Master Plan for Public Postsecondary Education 2001*, and the goals specified in the Request for Proposal, we have developed a customized plan of action that will enable us to:

- Assist the 13 universities gain control over new student enrollment by developing the capability to consistently achieve annual enrollment goals through improved marketing and recruiting strategies;
- Facilitate the development of marketing and recruiting plans that incorporate both annual and long-range strategies and tactics to achieve enrollment goals under the new admissions standards outlined in the *Master Plan* for higher education;
- Provide market research that will better inform marketing strategy development;
- Determine the enrollment management potential for the LTC and formulate action steps to reach its potential;
- Provide recommendations relative to the LTC campus mission delineation and program duplication;
- Provide opportunities for training and professional development in state-of-the-art enrollment management for the 13 universities, nine community colleges, and LSU; and
- Help the Board of Regents, the 13 statewide and regional universities, and the LTC begin to achieve self-sufficiency in enrollment management so that enrollment goals can be achieved in the future without external assistance.

We propose to accomplish these objectives through a combination of services, including on-campus consulting, a variety of professional development workshops, statewide market research, and an enrollment assessment for the LTC. Through these services we will be able to develop highly effective marketing and recruitment plans that incorporate the integrated strategies, tools, and support necessary to achieve new student enrollment goals at each institution.

At the conclusion of the project, the Board will have received the following deliverables:

- Institution-specific marketing and recruitment plans for each of the 13 statewide and regional universities that contain key statistics, strategies, action plans, timelines, budget evaluations, and implementation responsibilities
- A market research report that interprets the attitudes and perceptions of key populations toward Louisiana post-secondary institutions from Louisiana's eight economic zones and the neighboring states of Arkansas, Texas, and Mississippi
- A complete assessment of the enrollment management potential of the LTC and a written report containing recommendations relative to marketing, recruiting, and retention strategies
- A study of the level of campus mission delineation and program duplication among the 42 campuses of the LTC
- A final written report summarizing the project deliverables and the status of recommendations made throughout the project

Following is a detailed description of our approach to the project. We appreciate the opportunity to respond to your request for proposal and look forward to the possibility of extending our past partnership with the Louisiana Board of Regents.

Approach to the Project

Based on our experience and record of success helping develop enrollment plans for systems and their member institutions, we will assign two partnership coordinators who will be responsible for managing the project through completion. David S. Crockett, senior vice president, will be assigned to the LTC. Dave has experience managing system projects and most recently served as our partnership manager for the Indiana Commission of Higher Education (2000-present) and the Kentucky Community and Technical College System (1999-2001). He also managed our 42-month project with the former Minnesota Technical College System (1989-1992). Kevin Crockett, senior vice president, will serve as the partnership coordinator for the 13 statewide and regional universities project. Kevin has experience assisting systems develop highly effective marketing and recruiting plans, most recently working with the University System of Maryland.

Organizational Meetings

Week of April 8, 2002

We will begin the partnership by hosting a teleconference or video conference with the Louisiana Board of Regents. This meeting will include the two Noel-Levitz partnership coordinators, the Senior Vice President for Market Research Services, and appropriate staff members at the Louisiana Board of Regents. The focus of this meeting is to review the overall project and establish specific timelines for submission of market research results, institutional plans, and the LTC assessment, as well as establish times and locations for on-campus meetings, training, workshops, etc.

Week of April 15, 2002

The week of April 15, 2002, in Baton Rouge we will conduct project organizational meetings that will include statewide and regional university presidents (or their designees), campus enrollment coordinators, senior board and system staff, the President of the Louisiana Community and Technical College System (LCTCS), the chancellor of the LTC, and key members of the enrollment management teams from each of the 13 campuses. This time will be used to introduce the consultants, discuss project goals and objectives, present an overview of the enrollment management project, answer questions and concerns, and schedule future campus consulting visits.

Thirteen Statewide and Regional Universities

Following the organizational meeting in mid-April, we will facilitate a one-day enrollment planning workshop for up to three members of the marketing and recruiting team from each of the 13 campuses. The workshop will serve as an introduction to our approach to enrollment planning and prepare the campuses to collect appropriate data in support of the planning process.

Following this workshop, we will begin the ongoing consulting process that will facilitate the creation of marketing and recruitment plans for each of the 13 campuses. Consulting support will be provided through October 2002.

Market Research

Also in April, we will launch a five-month statewide market research project. Our market research experts will execute quantitative research, in addition to spending one full day on eight selected campuses conducting individual and focus group interviews. The results from these research efforts will support the formulation of marketing and promotional strategies designed to achieve statewide enrollment goals as outlined in the *Master Plan*. The research results and written report will be shared with the Noel-Levitz enrollment consultants, the 13 institutions, and the Board of Regents.

Louisiana Technical College

During the week of April 15, Noel-Levitz will meet with appropriate members of the Board of Regents and the LCTCS staff to review project goals and objectives of the Enrollment Management Assessment and the study relative to campus mission delineation and program duplication.

Between April and August 2002, we will:

- Conduct eight one-day regional enrollment management assessment work sessions for all 42 LTC campuses;
- Facilitate a one-day systemwide enrollment management planning workshop; and
- Complete a study relative to LTC's campus mission delineation and program duplication, under the direction of Paul Elsner of Paul Elsner and Associates.

The *Description of Components* section contains rationale as to why we are proposing a more comprehensive and inclusive methodology than requested in the RFP for the assessment phase.

Written Report

In late October, we will provide a final written report that contains a summary of action strategies conducted and the outcomes of each activity at the system and/or campus level. We will present our findings to the Regent's Planning, Research, and Performance Committee.

Project Implementation Schedule

A project implementation schedule is included below for your review. Following the implementation schedule is a concise narrative of each project component. We are available to answer any questions you may have regarding our approach to this partnership.

Proposed Implementation Schedule

Activity	Date	Participants	Description
Organizational meeting with Board of Regent Staff (videoconference or teleconference)	Week of April 8, 2002	Board of Regents: Senior staff Noel-Levitz: Project coordinators, Senior Vice President for Market Research Services, and Dr. Paul Elsner	Review the overall project and establish specific timelines for submission of market research results, institutional plans, and the LTC assessment, as well as establish times and locations for on-campus meetings, training, workshops, etc.
Organizational meeting with 13 campuses	Week of April 15 (preferred date: April 17, 2002)	Board of Regents: Senior staff 13 campuses: Presidents and key members of the enrollment team Noel-Levitz: President, project coordinators	Introduction of Noel-Levitz partnership coordinator, Noel-Levitz consultants, and project goals and objectives.
Organizational meeting with LTC	Week of April 15, 2002 (Preferred dates: April 17-18, 2002)	Board of Regents: Senior staff LCTCS: President LTC: Chancellor and eight regional administrators Noel-Levitz: Partnership coordinator and Dr. Paul Elsner	Introduction of Noel-Levitz partnership coordinator and Dr. Paul Elsner to review project goals and objectives and finalize project methods, logistics, and schedule.
Enrollment Planning Workshop (marketing and recruitment emphasis)	Week of April 15, 2002 (Preferred dates: April 17-18, 2002)	Board of Regents: Senior staff 13 campuses: Key members of the enrollment team Noel-Levitz: Partnership coordinator, consultants	Introduction to enrollment planning, gathering appropriate data to support enrollment planning and goal-setting, key strategy formulation, action plan development, development of a planning timetable for each campus.

Activity	Date	Participants	Description
LTC Project Informational Mailing	April 26, 2002	LTC recipients: Campus deans, directors, or assistant directors	Information packet describing goals, methodology, and project schedule.
Market Research	April-September 2002	13 campuses: Students from each of the eight economic regions Noel-Levitz: Market research consultants	Market research commences. This includes focus groups, telephone and online surveys.
Campus Visit I	April/May 2002	13 campuses: Key members of the enrollment team Noel-Levitz: Partnership coordinator, consultants	Refine list of enrollment planning data needs, conduct assessment of institution's current marketing and student recruitment program, and finalize the planning timetable.
Verbal Report to Board of Regents	End of April	Noel-Levitz: Partnership coordinators	Provide an update of progress made.
Enrollment Management Assessment Work Sessions	May/June 2002	LTC: Participants from each of the 42 campuses Noel-Levitz: Partnership coordinator, consultants	Assess the current state of enrollment management at the LTC and provide recommendations relative to marketing, recruiting, and retention strategies.
Campus Mission Delineation and Program Duplication Assessment	May-September 2002	Board of Regents: Selected staff LCTCS: President LTC: Chancellor, eight regional administrators, campus deans, directors or assistant directors Paul Elsner and Associates	Conduct a study including material review, onsite interviews, and develop recommendations relative to the LTC's campus mission delineation and program duplication.

Activity	Date	Participants	Description
Verbal Report to Board of Regents	End of May	Noel-Levitz: Partnership coordinators	Provide an update of progress made.
Presidential Enrollment Management Institute (Vail, CO)	June 23-25, 2002	13 campuses: One registration per institution LTC: One registration for LTC chancellor, and two registrations for selected LTC members Community Colleges and LSU: One registration per institution	The Presidential Enrollment Management Institute features sessions that provide high-level strategies for successful enrollment management—strategies that every president or chancellor should know.
North American Enrollment Management Institute (Denver, CO)	June 26-29, 2002	13 campuses: Two registrations per institution LTC: Three registrations for selected LTC members Community Colleges and LSU: Two registrations per institution	Presenters from campuses around North America and renowned authorities in the field will share ideas and information that can help improve student recruitment, marketing, and financial aid strategies.
Campus Visit II	June/July 2002	13 campuses: Key members of the enrollment team Noel-Levitz: consultants	Establish new student enrollment goals for fall 2003/2004/2005, develop a situation analysis for inclusion in the enrollment plan, and begin development of key enrollment strategies (as time permits).
Verbal Report to Board of Regents	End of June	Noel-Levitz: Partnership coordinators	Provide an update of progress made.

Activity	Date	Participants	Description
National Conference on Student Retention	July 24-27, 2002	<p>13 campuses: Two registrations per institution</p> <p>LTC: Three registrations for selected LTC members</p> <p>Community Colleges and LSU: Two registrations per institution</p>	Hear strategies and ideas from leading practitioners and experts in the field, covering topics from student retention and special populations to recruitment and financial aid.
Enrollment Management Planning Workshop	July/August 2002	<p>LTC: Key members of the enrollment team</p> <p>Noel-Levitz: Partnership coordinator, consultants</p>	A one-day drive-in workshop in Baton Rouge for the purpose of assisting the Louisiana Technical College campuses to develop comprehensive enrollment plans for 2002-03. This will enable the campuses to translate the results of the assessment phase into a cogent enrollment management plan.
Campus Visit III	July/August 2002	<p>13 campuses: Key members of the enrollment team</p> <p>Noel-Levitz: Consultants</p>	Finalize key enrollment strategies, identify action plans to be developed, and draft 2-3 action plans to serve as examples.
Verbal Report to Board of Regents	End of July	Noel-Levitz: Partnership coordinators	Provide an update of progress made.

Activity	Date	Participants	Description
Workshop: Enrollment Fundamentals and Building Effective Relationships with Prospective Students to Influence College Choice	August 2002	Board of Regents: Senior staff 13 campuses: Key members of the enrollment team Noel-Levitz: Consultants Other: Community Colleges and LSU	Two and a half day workshop will focus heavily on developing participants' skills in working with prospective students and their families.
Verbal Report to Board of Regents	End of August	Noel-Levitz: Partnership coordinators	Provide an update of progress made.
Campus Visit IV	September/October 2002	13 campuses: Key members of the enrollment team Noel-Levitz: Consultants	Review action plans and draft of entire document. Make final modifications to the document for submission to the Board of Regents.
Verbal Report to Board of Regents	End of September 2002	Noel-Levitz: Partnership coordinators	Provide an update of progress made.
Verbal Report to Board of Regents	End of October 2002	Noel-Levitz: Partnership coordinators	Provide an update of progress made.
Written Report with a verbal presentation of outcomes to the Regent's Planning, Research, and Performance Committee	October	Noel-Levitz: Project coordinators, project administrators	Present a written report that contains a summary of action strategies conducted and the outcomes of each activity at the system and/or campus level.

Description of Components

Develop a comprehensive marketing and recruiting plan for the 13 campuses

A primary goal of the Louisiana Board of Regents is to ensure that each of the 13 four-year institutions develops a comprehensive marketing and recruiting plan designed to support realistic, institution-specific new student enrollment goals. The development and implementation of the enrollment plan will enable each institution to increase its marketing and recruiting effectiveness. We will provide ongoing consulting to aid each of the 13 institutions in developing their individual enrollment plan. Our consultants will focus on the following areas.

- Developing comprehensive written marketing and enrollment plans for each campus that are consistent with the statewide goals and objectives identified in the *Master Plan*.
- Developing and implementing a staff training and development program for the state's enrollment managers.

Enrollment Goal-setting and Development of Comprehensive Written Marketing and Recruitment Plans for Each Campus

Fundamental to any successful enrollment management program is developing and implementing an annual marketing and recruitment plan. The *Systemwide Strategic Enrollment Analysis* conducted for the Louisiana institutions, revealed that although the state is facing a 12 percent decline in high school graduates and potential enrollment declines on individual campuses resulting from the new admissions standards, most of the four-year institutions have not accounted for this in their enrollment planning. Noel-Levitz' enrollment consulting services are designed to assist institutions to develop and begin to implement a comprehensive, results-oriented marketing and recruitment plan.

Planning does not ensure results, but it does provide a disciplined appraisal, goal setting, and strategizing that can minimize the chance for failure. A well-conceived enrollment plan is simply an organized thought process and communication tool that describes *what* the institution wants to achieve and *how* it will accomplish it. A strong enrollment planning process benefits an institution by:

- Providing a systematic assessment of strengths, weaknesses, opportunities, and threats;
- Establishing consensual institutional goals and priorities;
- Encouraging innovative thinking and problem solving;
- Creating awareness of obstacles that may need to be overcome;
- Coordinating and unifying staff effort;

- Ensuring more effective use of existing resources and identifying the possible need for additional resources;
- Assigning responsibility and accountability, and scheduling work;
- Facilitating control and evaluation of activities;
- Communicating and documenting the enrollment “game plan”; and
- Providing a basis for future planning.

In developing enrollment plans for Louisiana’s four-year colleges and universities it is important to remember that the elements mentioned above are not as critical as the ability to develop an understandable and workable plan to guide efforts and achieve results that are consistent with the *Master Plan* goals.

It is worth noting that Noel-Levitz consultants will not write the enrollment plans for each campus. Rather, we will guide the planning process and ensure that the institutions have incorporated the latest enrollment strategies and tactics in their plans. We have learned that when consultants write an enrollment plan, it often fails to get fully implemented. On the other hand, when those persons responsible for implementing the plan are actively engaged in its development, their commitment to implement the planned strategies is always higher.

Goal-setting and Plan Development (April 2002-October 2002)

We propose to launch the marketing and recruitment goal-setting and planning process with a one-day workshop during the week of April 15, 2002 (the preferred workshop dates are April 17-18). Three members from each institution’s marketing and recruitment team should plan to attend. This workshop will include the following topics.

- An introduction to the Noel-Levitz approach to enrollment planning
- Gathering appropriate data to support enrollment planning and goal-setting
- Key strategy formulation
- Action plan development
- Development of a planning timetable

Following this introductory workshop, each campus will schedule an initial two-day consultation with their assigned marketing and recruiting consultant. This visit to campus will have two purposes. First building on the workshop content, the consultant will assist the institution in refining the list of necessary data to conduct enrollment planning and goal-setting. Second is assessing the institution’s current marketing and student recruitment program. The latter task will utilize the *Systemwide Strategic Enrollment Analysis* as an outline for assessing the degree to which the findings and recommendations contained in that document apply to a particular campus. The consultation will also familiarize the consultant with campus-specific issues that need to be addressed during the planning process.

Following the initial site visit to each campus, three additional two-day consultations will be scheduled for July through October 2002. This time on-campus will be used to establish new

student enrollment goals for fall 2003, fall 2004 and fall 2005, develop key marketing and recruitment strategies, and to develop and begin to implement detailed action plans in support of the enrollment goals.

Professional Development

We propose to deliver the staff-training and professional development component of our work in two ways. First, selected enrollment team members from the 13 universities, nine community colleges, LSU, LTC and System office will receive training on exemplary enrollment management practices through participation in our summer North-American Enrollment Management Institute in Denver, CO, Presidential Enrollment Management Institute in Vail, CO, and National Conference on Student Retention in Washington, DC. Please note that proposal costs do not include travel for the Louisiana participants to these three Noel-Levitz conferences.

In addition, we will conduct a two and a half-day workshop titled *Enrollment Fundamentals and Building Effective Relationships with Prospective Students to Influence College Choice*, for selected members of each institution's outreach staff and enrollment management team, System office personnel and Board of Regents staff. A description of the workshop follows.

Enrollment Fundamentals and Building Effective Relationships with Prospective Students to Influence College Choice (August 2002 - for up to ten outreach staff from each campus)

Purpose

- Educate participants in basic enrollment management theory
- Develop an understanding of student college choice theory
- Build and develop needed presentation, interview, and telecounseling skills
- Provide a forum for front-line staff for open discussion, questions and answers

Description

One of the primary goals of the project is to begin the process of achieving self-sufficiency in enrollment management for the Louisiana four-year institutions. Transferring knowledge and expertise from our consultants to institutional staff members and helping them to develop and refine a variety of skills is essential to gaining long-term control over enrollment. This two and a half day workshop will focus on developing fundamental enrollment management skills and how to work most effectively with prospective students and their families.

Workshop outline:

- Understanding the enrollment funnel
- Primary conversion and yield strategies
- Managing a recruitment territory
- Qualifying and grading the enrollment funnel

- Understanding student college choice models
- The counseling-selling model and its use in student recruitment
- Effective high school visits, college fairs, and group presentations
- Applying the counseling-selling model to the telephone
- Recruitment simulations

Delivery Methods

Noel-Levitz will deliver its consulting services through a combination of on-campus consultations, workshops, teleconferences, Web conferences, videoconferences, and e-mail dialogues.

This proposal encompasses four on-campus consultations for each institution. The time spent on each campus will be used for training, presentations to various campus constituencies, enrollment planning, communications planning, meetings with the enrollment team and campus officers, and developing strong group and individual working relationships with the institution's staff and faculty. Following each consultation, the campus project coordinator will receive a written report containing findings, recommendations, and an updated project schedule.

A variety of other components of the project such as regular updates between visits, program planning, project scheduling, and monitoring progress towards goals can be more effectively accomplished by electronic communications. Typically, each consultant will schedule an electronic conference with the project team between on-campus consultations to address these matters. Moreover, informal e-mail exchanges and telephone calls between the consultant and campus are common during projects. A determination of the media and schedule that will best serve each institution's enrollment planning needs will be made jointly by the project coordinator on each campus and the Noel-Levitz consultants.

The *Enrollment Planning* and the *Enrollment Fundamentals and Building Effective Relationships with Prospective Students* workshops will be delivered to multiple campuses in a central location. A follow-up report will be prepared after each session that summarizes the workshop content and participant evaluations.

Market Research Project: collect attitude and perception data

To maximize the effectiveness of the enrollment and marketing plans, we will conduct a statewide market research project to collect current attitude and perception data. Specifically, the research will describe the perceptions of Louisiana's public colleges and universities among four distinct audiences: college-bound high school students, their parents, high school guidance counselors and prospective adult students. Through this research we will gather information about the college choice process, decision influence, and college choice motives. The results from the market research will be used as a foundation for recruitment and marketing strategy development. The results from this project can also be used to create the strategies, messages and focus for the development of a future statewide marketing plan, if appropriate.

To fully understand the perceptions of Louisiana higher education, Noel-Levitz will collect and analyze sufficient data from Louisiana's eight state economic development zones. In addition, we will survey select markets and audiences in the contiguous states of Texas, Arkansas, and Mississippi. Specific questions that may be addressed in this research include:

- What are the market perceptions of Louisiana state institutions?
- What misperceptions exist?
- What are the common attributes of students' first-choice schools?
- When do Louisiana students begin making their college decisions?
- How far will Louisiana students travel geographically to attend school?
- What is Louisiana's reputation for quality and value outside state borders?
- Why do students leave our institutions?
- What majors are high school juniors most interested in?
- What does eastern Texas need that they don't have?
- How can we best communicate with high school guidance counselors?
- Where do we fit in the minds of parents in terms of impressions, value, image, programs, and costs?
- How can we position ourselves favorably with nontraditional students against the for-profits such as University of Phoenix?

We will accomplish this by following a two-step process, as described below.

Step One: Focus groups

The first step in the research process will be to conduct focus groups of current students in each of the eight economic development regions. Noel-Levitz market research consultants will conduct one full day of focus groups at eight selected campuses in the economic development regions for a total of eight days. Sessions will include separate focus groups of traditional-age and nontraditional students. These focus groups will allow Noel-Levitz to develop research themes and focus. The Board of Regents will be responsible for working with the institutions to recruit focus group participants, with appropriate direction from Noel-Levitz.

Step Two: Survey research

The second step in the research process will be to execute telephone and online surveys. We will conduct four separate surveys, each targeting a different population. The results from this research will provide valuable insight into the image and perception of postsecondary education opportunities in the state of Louisiana, the college-choice process of college-bound high school students and prospective adult students, and the influences of parents and high school guidance counselors. These insights will then be translated into recommendations that can be used in the individual enrollment plans. A description of these four surveys is listed below.

Survey One: A customized telephone survey of college-bound high school students.

Purpose

- To describe the perceptions of Louisiana's postsecondary education opportunities among college-bound high school students in the eight economic development zones and in selected regions in the neighboring states of Texas, Arkansas, and Mississippi
- To describe the resources used by college-bound high school students in these regions when gathering information about their college choices
- To identify the key motivations and influences on the college-choice decisions of college-bound high school students in these regions

Description of methodology

We will target a sample size of 1,000 completed 12 – 14 minute interviews, structured as follows: 800 respondents from Louisiana distributed evenly among the state's eight economic development zones. An additional 200 respondents will come from the regions of Texas, Arkansas and Mississippi that are in closest proximity to Louisiana. The sample also will be divided evenly between current high school juniors and current high school seniors. The total sample size of 1,000 respondents would provide a confidence interval of +/- 3% at the 95% confidence level. A customized survey instrument will be designed in consultation with representatives of the Louisiana Board of Regents' staff. Noel-Levitz will provide the list of names.

Survey Two: A customized telephone survey of parents of college-bound high school students.

Purpose

- To determine the extent of parental involvement in the college decision-making process among parents of college-bound high school students in the eight economic development zones and selected regions in the neighboring states of Texas, Arkansas, and Mississippi
- To describe the perceptions of Louisiana's postsecondary education opportunities among parents of college-bound high school students in these regions

Description of methodology

We will target a sample of 500 completed 12 – 14 minute interviews, evenly divided among the state's eight economic development zones (50 completed parent interviews per zone plus 100 distributed across selected areas of Texas, Arkansas and Mississippi). We can use a smaller sample size for the survey of parents because the research questions have to do with parental influence regardless of differences in their sons' or daughters' year in high school. The total sample size of 500 respondents would provide a confidence interval of +/- 5% at the 95% confidence level. The customized survey instrument will be designed in consultation with

representatives of the Louisiana Board of Regents' staff. Noel-Levitz will provide the list of names.

Survey Three: A customized *online* survey of high school guidance counselors in Louisiana, Texas, Arkansas, and Mississippi.

Purpose

- To describe the perceptions of Louisiana's educational opportunities among a sample of high school guidance counselors
- To describe how high school guidance counselors prefer to receive information about colleges and universities
- To describe how guidance counselors share college information with students

Description of methodology

We will target a sample of 150 high school guidance counselors to complete the online survey. However, response rates can vary and response largely will depend on the counselors' recognition of the survey's value. Results from this survey will be exploratory in nature, as the targeted sample size is small and it is difficult to control for the demographic make-up of the respondents. The value of such a survey is that it is a way of identifying some of the perceptions that high school guidance counselors have of Louisiana's colleges and universities. Because of the limited sample size, we will not be able to judge the extent of these perceptions, nor whether the perceptions of the respondents represent the perceptions of the state's high school counselors in general.

The customized survey instrument will be designed in consultation with representatives of the Louisiana Board of Regents' staff to identify the ways in which high school guidance counselors prefer to receive information about colleges and universities, how they share this information with their students, and the counselors' perceptions of the opportunities available among the state's colleges and universities. The Board of Regents' staff will need to provide a list of the names and addresses of high school guidance counselors. Noel-Levitz will then mail an invitation to the survey to each counselor on the list, along with the address of the survey Web site. A list of at least 1,500 counselors will be needed.

Survey Four: A customized telephone survey of adults (ages 25 – 55) who are considering taking college or university classes.

Purpose

- To identify the extent of interest in college among these adults
- To describe their perceptions of educational opportunities in Louisiana
- To identify the reasons these adults have for pursuing higher education

Description of methodology

We will target a sample size of at least 1,000 adults to be contacted for a very brief interview (up to 3 qualifying questions) to identify the extent of adult interest in enrolling in college, and of these adults, 400 would be selected for in-depth interviews of about 12 – 14 minutes about their college plans and their perceptions of postsecondary education opportunities available to them in Louisiana. Both the 1,000 brief interviews and the 400 in-depth interviews would be distributed in proportion to the adult population in each of the eight economic development zones. The total sample size of 1,000 respondents would provide a confidence interval of +/- 3% at the 95% confidence level, while the sample of 400 in-depth interviews would provide a confidence interval of +/- 5% at the 95% confidence level.

The customized survey instrument will be designed in consultation with representatives of the Louisiana Board of Regents' staff to answer questions about the reasons for pursuing higher education, degree plans, intended majors, planned attendance status, resources to be used to finance their education and their perceptions of how well Louisiana's colleges and universities might serve their needs. We also would include questions to determine how likely these adults are to take advantage of online learning opportunities available to them, both through programs offered by Louisiana's colleges and universities and by programs offered by online competitors, such as the University of Phoenix. Noel-Levitz will provide the list of names.

Step Three: Written report

We will conclude the statewide market research project with a report summarizing and interpreting findings of the above studies and surveys. We will provide action-oriented strategies and recommendations that can be used as a foundation for recruitment and marketing strategies. The research results and written report will be shared with the Noel-Levitz enrollment consultants, the 13 institutions, and the Board of Regents and system staff.

Assessing the Current State of Enrollment Management at the Louisiana Technical College

A primary goal of the Board of Regents is to assess the current state of enrollment management at the LTC and provide recommendations for marketing, recruiting, and retention efforts to support attainment of the goals stated in the *Master Plan* as well as recommendations relative to campus mission delineation and program duplication. We propose to achieve these goals using the following approach.

First, to successfully assess the current state of enrollment management at the LTC, we propose conducting an Enrollment Management Assessment (EMA) for each of the 42 Louisiana Technical College campuses. This approach differs from the Board's request to conduct visits at *selected* Louisiana Technical College campuses, via eight regional work sessions. After careful consideration, we believe that this more inclusive methodology will have the most positive enrollment impact and garner the greatest support and commitment to an enrollment management approach, as well as do the most good for the most campuses. Should the Louisiana Board of

Regents prefer the onsite visits at selected LTC campuses, Noel-Levitz has included a brief description on page 28.

Second, in partnership with Paul Elsner and Associates, we will conduct a separate study in order to make recommendations relative to campus mission delineation and program duplication.

A detailed description of each methodology follows.

Goal One: Recommendations for Marketing, Recruitment, and Retention Efforts to Support the Attainment of *Master Plan* Goals and Objectives

Noel-Levitz will conduct an Enrollment Management Assessment for each of the 42 Louisiana Technical College campuses, via eight regional work sessions. The Enrollment Management Assessment will be structured to identify marketing, recruitment, and retention strengths and opportunities and to recommend common and specific enrollment-related strategies for each campus designed to achieve both short- and long-term results consistent with the *Louisiana Master Plan for Postsecondary Education: 2001*.

The assessment will achieve four important goals:

1. The assessment will provide each Louisiana Technical College campus with an external and objective analysis of their enrollment management practices and strategies and identify strengths and limitations that drive or inhibit their marketing, recruitment, and retention efforts.
2. It will introduce the campuses to state-of-the-art enrollment management strategies that have been proven successful at other technical colleges nationally.
3. The assessment will assist each Louisiana Technical College campus to establish or modify current tactical directions and strategies that are intended to take advantage immediately of opportunities to achieve enrollment goals while addressing longer-term strategic enrollment-related issues.
4. The assessment phase will result in the development of an Enrollment Management Profile and an enrollment planning workshop, enabling each institution to develop a comprehensive enrollment management plan that will enhance the way that they attract and retain students.

The assessment will consist of the following four steps:

1. Each of the Louisiana Technical College campuses will provide Noel-Levitz with requested enrollment management-related information. This material will help prepare the Noel-Levitz consultant for the eight Enrollment Management Assessment regional work sessions described in step two below.
2. Noel-Levitz will conduct one-day Enrollment Management Assessment regional work sessions at a hotel or campus site in each of the eight Louisiana economic development regions. The sessions will be designed to individually analyze current marketing, recruitment, and retention strategies and identify improvements or modifications that are needed to enhance effectiveness.
3. The by-product of the regional work sessions will be a Noel-Levitz consultant produced Enrollment Management Profile for each Louisiana Technical College campus that will

- identify the forces that currently drive or restrain the institution's ability to attract and retain students and provide specific and general recommendations for marketing, recruitment, and retention strategies.
4. As a follow-up to the regional work sessions, Noel-Levitz will conduct a systemwide enrollment management planning workshop in Baton Rouge that will facilitate their development of a comprehensive enrollment management plan for each institution. And that incorporates both annual and longer-range strategies and tactics to achieve both new and returning new student goals.

Step One: Data/Information Review

The data/information step includes a review of a variety of institutional plans, reports, information, recruitment letters and promotional publications, and other materials provided by the institutions within the region to facilitate an understanding of current marketing, recruitment, and retention strategies and practices. The campus should compile the information requested by the consultant and mail to Noel-Levitz two weeks prior to the scheduled regional work session. This information will give the consultant a strong first impression of enrollment-related issues, strategies, and processes. If any of the material is not available or easily collected, the institution should not devote extensive staff time to creating or collecting it. The Noel-Levitz consultant will explore these areas more fully during the work session. Following is typically the kind of information the consultant likes to review in advance:

- A copy of current marketing, recruitment, and retention plans
- A five-year enrollment history showing total enrollment and new student enrollment
- A five-year admissions funnel history showing the number of inquiries, applicants, admits, confirmations, enrolled students, and related conversion and yield rates
- College catalog
- Any previous enrollment-related consulting reports, institutional self studies, and institutional strategic plans or committee reports, received or developed during the last three years related to either recruitment or retention
- A complete set of recruitment letters and promotional publications used to communicate with prospective students
- The past year's, current year's, and next year's (if available) recruitment/marketing budgets
- Description of any institutional merit or no-need scholarship programs (include student qualifications and requirements, application procedures, and deadlines)
- Attrition/retention data from the past three to five years by selected student characteristics (e.g., age, ability, race, gender, GPA)
- A current campuswide organizational chart, enrollment unit organizational chart, and position descriptions
- Enrollment projections and goals
- Any previous market research reports or highlights from the past three years
- Examples of marketing/advertising materials

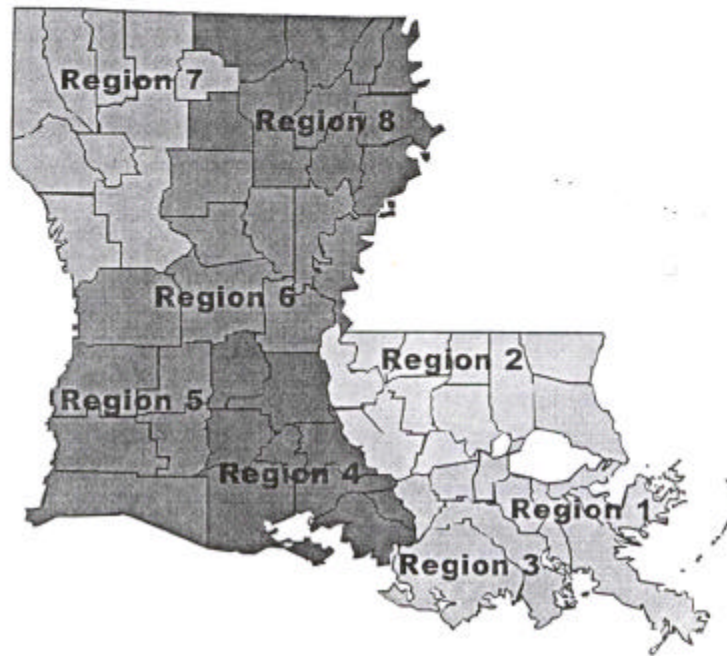
- A list of all inquiry generation strategies (e.g., high school visits, print advertising)
- Recruitment and admissions communication and intake system flow charts
- Inquiry source code analysis for applied and enrolled students
- Student satisfaction/opinion surveys and reports
- Withdrawing/non-returning student research
- Brief description of major retention-related strategies and programs (e.g., assessment, orientation, advising, “early-alert” system, academic support services)
- Any publications or written materials that provide insight into key program/service areas (e.g., freshman seminar, teaching/learning, academic support services)
- Any additional information that is readily available and that would help Noel-Levitz prepare for an effective analysis

Each campus will also be asked to complete a Noel-Levitz provided *Enrollment Management Self-Inquiry*. This instrument is designed to provide a quick assessment of each campus’s current enrollment management-related strategies and practices. The content addresses those elements associated with successful enrollment management programs in technical colleges nationally.

Step Two: Regional Enrollment Management Assessment Work Sessions

Working in cooperation with the Louisiana Community and Technical College System office, Noel-Levitz will conduct eight one-day drive-in Enrollment Management Assessments in each of the Louisiana economic development districts as shown below:

Louisiana Economic Development District Map



Region 1

Jefferson
Orleans
Plaquemine
St. Bernard
St. Charles
St. James
St. John Baptist
St. Tammany

Region 2

Ascension
East Baton Rouge
East Feliciana
Iberville
Livingston
Point Coupee
St. Helena
Tangiphoa
Washington
West Baton Rouge
West Feliciana

Region 3

Assumption
Lafourche
Terrebonne

Region 4

Acadia
Evangeline
Iberia
Lafayette
St. Landry
St. Mary
St. Martin
Vermillion

Region 5

Allen
Beauregard
Calcasieu
Cameron
Jefferson Davis

Region 6

Avoyelles
Catahoula
Concordia
Grant
La Salle
Rapides
Vernon
Winn

Region 7

Bienville
Bossier
Caddo
Claiborne
De Soto
Lincoln
Natchitoches
Red River
Sabine
Webster

Region 8

Caldwell
East Carrol
Franklin
Jackson
Madison
Morehouse
Ouachita
Richland
Tensas
Union
West Carrol

The Louisiana Technical College campuses and Noel-Levitz consultants will be assigned to regional work sessions as follows:

Region 1 (One or Two Noel-Levitz Consultant(s))	Region 5 (One Noel-Levitz Consultant)
LTC – Jefferson	LTC – Morgan Smith
LTC – River Parishes	LTC – Oakdale
LTC – Sidney Collier	LTC – Sowela
LTC – Slidell	Region 6 (One Noel-Levitz Consultant)
LTC – West Jefferson	LTC – Alexandria
Region 2 (Two Noel-Levitz Consultants)	LTC – Avoyelles
LTC – Ascension	LTC – Huey P. Long
LTC – Baton Rouge	LTC – Lamar Salter
LTC – Florida Parishes	LTC – Shelby Jackson
LTC – Folkes	Region 7 (Two Noel-Levitz Consultants)
LTC – Hammond Area	LTC – Mansfield
LTC – Jumonville	LTC – Natchitoches
LTC – Sullivan	LTC – Northwest
LTC – Westside	LTC – Ruston
Region 3 (One Noel-Levitz Consultant)	LTC – Sabine Valley
LTC – L.E. Fletcher	LTC – Shreveport Bossier
LTC – Lafourche	Region 8 (One Noel-Levitz Consultant)
Region 4 (Two Noel-Levitz Consultants)	LTC – Bastrop
LTC – Acadian	LTC – Delta Ouachita
LTC – Charles B. Coreil	LTC – North Central
LTC – Evangeline	LTC – Northeast
LTC – Gulf Area	LTC – Tallulah/M.Surles
LTC – Lafayette	
LTC – T.H. Harris	
LTC – Teche Area	
LTC – Young Memorial	

The work sessions will be conducted at a hotel or campus site to be mutually determined by LCTCS and Noel-Levitz. Each campus will be assigned either a two- or three-hour individual appointment with a Noel-Levitz consultant. The six largest enrollment LTC campuses (LTC - Baton Rouge, LTC – Lafayette, LTC – L.E. Fletcher, LTC Shreveport-Bossier, LTC – Sowela, and LTC – Young Memorial) will be scheduled for the three-hour sessions. Possible regional work session sites are listed below:

Region 1	New Orleans
Region 2	Baton Rouge
Region 3	Thibodaux
Region 4	Lafayette
Region 5	Lake Charles
Region 6	Alexandria
Region 7	Shreveport
Region 8	Monroe

Each campus would select one to three persons most knowledgeable about current marketing, recruitment, and retention strategies to participate in the individual campus-specific work sessions.

The agenda for each individual work session would be structured to achieve the following objectives:

- Review and validate the results of the *Enrollment Management Self-Inquiry*
- Identify enrollment-related driving and restraining forces
- Discuss campus-specific enrollment goals and issues
- Assess current marketing, recruitment, and retention strategies and tactics
- Delineate campus-specific and general enrollment management recommendations to assist the campus in developing an action plan to achieve enrollment goals

Each individual analysis will typically include the following general areas of inquiry:

- A review of the institution's present marketing, recruiting, and retention strategies and plans including specific enrollment goals, objectives, and strategies
- A review of any available market research and ways that the research is being used in formulating current action plans and the current position of the campus in the marketplace
- The institution's present and desired position and image in the marketplace
- A review of current admissions operations and systems to communicate with students at the inquiry, application, and admit stages
- Ways the campus is target marketing – according to audience
- Present prospect conversion and yield strategies

- Strategic use of financial aid in meeting enrollment objectives
- The use of telecounseling in the recruitment program
- Database enrollment management procedures and use of data for analysis, tracking, projections, and reporting
- Current utilization of human resources including staff, faculty, and students
- The use of technology to enhance recruitment and retention
- A review of computer capability in support of the enrollment program
- Organizational structure for recruitment and retention
- A review of the effectiveness of current retention strategies and action programs

Noel-Levitz believes that the inclusive individualized work session approach described and proposed above is sufficient to accurately assess current enrollment management practices at each of the campuses and to formulate a set of results-oriented recommendations. The by-product of the assessment process is the development of a written Enrollment Management Profile containing specific observations and recommendations for each campus.

Step Three: Enrollment Management Profile

Within approximately twenty working days following the individual Enrollment Management Assessment working session, each Louisiana Technical College campus and the LCTCS will receive a concise Enrollment Management Profile for their institution. The profile will consist of the following components:

- Major enrollment-related campus driving and restraining forces
- Analysis of current marketing, recruitment, and retention strategies and tactics
- Recommended marketing, recruitment, and retention key strategies

It should be noted that while there will likely be both campus specific and general systemwide recommendations, based upon our previous system work, the recommendations will probably be more similar than different across the campuses.

Step Four: Enrollment Management Planning Workshop

Noel-Levitz will conduct a one-day drive-in workshop in Baton Rouge for the purpose of assisting the Louisiana Technical College campuses to develop comprehensive enrollment plans for 2002-03. This will enable the campuses to translate the results of the assessment phase into a cogent enrollment management plan.

The workshop will include the following topics:

- An introduction to the Noel-Levitz approach to enrollment management planning
- Gathering appropriate data to support enrollment planning and goal-setting
- Key enrollment strategy formulation
- Action plan development
- Development of a planning timetable

Each participant at the planning workshop will receive a Noel-Levitz enrollment planning workbook designed to aid and abet the planning process.

Campuses will be asked to submit a draft copy of their plan to the Noel-Levitz consultant for review and telephone conference comment. The final copy of the enrollment management plan will also be provided to the LCTCS and the Board of Regents.

NOTE:

Should the Louisiana Board of Regents prefer the onsite visits at selected LTC campuses, Noel-Levitz has included methodology on this option, below.

Noel-Levitz proposes working with sixteen selected Louisiana Technical College Campuses distributed as follows:

- Six largest campuses (enrollment>1000)
- Five mid-size campuses (enrollment 500-999)
- Five small campuses (enrollment<500)

Large (6)

LTC – Baton Rouge	(1,485)
LTC – Lafayette	(1,107)
LTC – L.E. Fletcher*	(959)
LTC – Shreveport-Bossier	(1,198)
LTC – Sowela	(1,906)
LTC – Young Memorial	(1,366)

*Included in this category since enrollment closely approximates >1,000.

Medium (12)

LTC – Alexandria	(881)
LTC – Avoyelles	(540)
LTC – Delta Quachita	(596)

LTC – Jefferson	(875)
LTC – Natchitoches	(533)
LTC – Northwest	(614)
LTC – River Parishes	(586)
LTC – Sidney N. Collier	(589)
LTC – Sullivan	(728)
LTC – Teche Area	(514)
LTC – T.H. Harris	(624)
LTC – Westside	(514)

Small (24)

LTC – Acadian	(292)
LTC – Ascension	(282)
LTC – Bestrop	(228)
LTC – Charles B. Corell	(203)
LTC – Evangeline	(222)
LTC – Florida Parishes	(233)
LTC – Folkes	(221)
LTC – Gulf Area	(453)
LTC – Hammond Area	(229)
LTC – Huey P. Long	(200)
LTC – Jumonville	(454)
LTC – Lafourche	(406)
LTC – Salter	(341)
LTC – Mansfield	(176)
LTC – Morgan Smith	(201)
LTC – North Central	(172)
LTC – Northeast	(193)
LTC – Oakdale	(304)
LTC – Ruston	(181)
LTC – Sabine Valley	(300)
LTC – Shelby Jackson	(224)
LTC – Slidell	(400)
LTC – Tallulah	(429)

LTC – West Jefferson

(327)

If the selected campus option is chosen, the analysis would consist of the following three steps:

1. The selected campuses will provide information to Noel-Levitz for review in advance. This material will help prepare the Noel-Levitz consultant for the site visit and analysis.
2. Noel-Levitz will conduct a site visit that includes interviews and focus groups, and a two-hour executive briefing highlighting preliminary observations and recommendations.
3. Noel-Levitz will submit a brief written summary within 20 working days following the visit. The report will identify the forces that currently drive or restrain the campuses' ability to attract and retain students, and provide specific recommendations for marketing, recruitment, and retention strategies.

The duration of the assessment phase will be April 2002 to August 31, 2002.

Goal Two: Recommendations Relative to Campus Mission Delineation and Program Duplication

Noel-Levitz will partner with Paul Elsner and Associates of Phoenix, Arizona to develop recommendations relative to campus mission delineation and program duplication.

Paul Elsner and Associates is an internationally known higher education consulting firm that specializes in work with two-year public community and technical colleges. Dr. Elsner has agreed to provide the leadership to direct this component of the project and has assembled an outstanding team of associates with the expertise and experience to conduct this consultancy.

The team is prepared to review the role, scope, and mission of the Louisiana Technical College as currently contained in the *LCTCS Strategic Plan* for the purpose of reducing program duplication and more clearly and specifically delineating the following seven mission elements for each of the campuses:

1. Economic Development
2. Workforce Development
3. Basic Skills and Literacy Development
4. General Educational Development
5. Career Skills Development
6. University-Level, Lower Division Education Development
7. Secondary School Vocational Technical Educational Development

Dr. Paul Elsner will interview the following persons as an initial step in defining the parameters for the study:

- Dr. Walter Bumphus, president, Louisiana Community and Technical College System
- Dr. William J. Roden, chancellor, Louisiana Technical College
- Dr. James S. Clarke, deputy commissioner for planning, research and performance, Louisiana Board of Regents

- Eight LTC regional administrators

The specific purposes of these discussions would be to:

- Clarify and reach agreement on the goals and expectations for this component of the project
- Discuss pertinent issues and background information relative to the study
- Identify any materials and information that would be needed by the consulting team (e.g., statutory, charter, enabling legislation materials, *LCTCS Strategic Plan*, Board of Regents *Master Plan*, program descriptions, matrix of program offerings by technical and community college campuses)
- Finalize project methodology, logistics, and time and task schedule

Based on the results of the above discussions, a project plan will be finalized and submitted to LCTCS for approval. Elements of the plan would likely include the following activities:

- If deemed appropriate, a session with the LCTCS' Board of Supervisors to review the project work plan and discuss issues and respond to any questions regarding the project
- An analysis of all pertinent information and materials
- Site visits to selected LTC campuses or centralized interviews with LTC campus deans, directors, and assistant directors in the eight Louisiana economic development regions. If the site visits to selective LTC campuses is chosen, it would include a minimum of sixteen campuses distributed as follows:
 - Six largest campuses (enrollment >1000)
 - Five mid-size campuses (enrollment 500-999)
 - Five small campuses (enrollment <500)

As in the enrollment assessment, we recommend using an inclusive versus exclusive methodology. This is particularly important for this component due to the sensitivity and “politics” associated with review and possible program reduction.

The product of the study would include a final written report containing findings and recommendations submitted to LCTCS and the Louisiana Board of Regents.

Written Report

In late October, we will provide a final written report that contains a summary of action strategies conducted and the outcomes of each activity at the system and/or campus level. We will present our findings to the Regent's Planning, Research, and Performance Committee.

Consultants involved with the project

Noel-Levitz has a long and successful history of helping colleges, universities and higher education systems achieve their enrollment goals. The foundation for this success is the talented and experienced pool of professional enrollment management consultants who deliver our ongoing enrollment consulting services. Enrollment consulting as practiced by Noel-Levitz is designed to accomplish the following goals:

- Ensure our consultants' full understanding of each institution's mission and vision, enrollment goals, points of difference, and barriers to enrollment success so that strategies can be customized to fit their unique needs and circumstances;
- Facilitate the necessary changes in each institution's enrollment management strategies, systems, and practices to support fully the achievement of annual enrollment goals;
- Ensure the full and effective implementation of planned changes in strategy and tactics;
- Provide training and development experiences for members of the enrollment team to build the knowledge and skills needed for success now and in the future; and
- Institutionalize the changes in strategy and practice so that institutions can achieve enrollment goals in the years ahead without external assistance.

Noel-Levitz consultants are experienced change agents who routinely work with colleges and universities to develop and help implement comprehensive enrollment plans, review and revise systems that must work together seamlessly, and facilitate the changes in organizational behavior necessary to support the full achievement of enrollment goals.

Outlined below are the biographies of the consultants who will be assigned to this project. Please note that we will assign two additional consultants to the Marketing and Recruiting portion of this project, who have yet to be determined.

This listing of consultants below is subject to change based on consultant availability and workload. Any changes will be per the Board's approval.

Marketing and Recruiting Consultants

Douglas Christiansen, associate consultant

Douglas Christiansen is the assistant vice president for enrollment services at Purdue University (IN). As Chief Admissions Officer, he is responsible for overall leadership and administration of the marketing, recruitment, selection, and orientation of the student population. His areas of expertise include admissions, financial aid, and international recruitment. He is completing a highly successful 18-month enrollment project, for Noel-Levitz, with Chicago State University.

Dr. Christiansen has been instrumental in several enrollment and retention related successes at Purdue University. Under his leadership, a 22 percent increase in its freshman class was realized over the past five years. Regarding academic quality, Purdue achieved a 15 percent increase in

average SAT scores for entering students. In addition to enrollment and academic successes, Dr. Christiansen strategically led the university to a 163 percent increase in international first year undergraduate population.

An expert in his field, Dr. Christiansen has presented for the American Association of Collegiate Registrars and Admissions Officers Annual National Conference, the World Leadership Conference, and the Council for Advancement and Support of Education. He is a member of the Committee on Institutional Cooperation, National Association of College Admissions Counselors, and Association of Chief Admissions Officers of Public Universities.

Dr. Christiansen received his doctor of philosophy focusing on educational administration in higher education from the University of Utah.

Jacqueline Hunt Clark, associate consultant

With more than 20 years of educational experience, Jacqueline Hunt Clark serves Noel-Levitz as an associate consultant while maintaining her duties as vice chancellor of enrollment management at the University of North Carolina at Pembroke. In this post, Ms. Clark provides leadership in the development, implementation, and management of comprehensive marketing, recruitment, and admissions plans for the university.

At the University of North Carolina at Pembroke, Ms. Clark has been instrumental in significantly increasing the quality and diversity of incoming freshman classes. Examples of this include a 56.8 percent increase in freshman applications; a 29 point rise in average SAT scores; a 15 percent increase in out-of-state enrollment; and a 20 percent jump in transfer enrollment.

Prior to her current position, Ms. Clark served as UNC's campus coordinator for Title III and the Americans with Disabilities Act, and also counseled first-generation, low income, and disabled students for Student Support Services. She has received the Commanders Distinguished Service Award after serving as family advocacy coordinator and social service manager for the United States Army.

Ms. Clark received her M.Ed. in Educational Guidance and Counseling from Campbell University.

Kevin Crockett, senior vice president for consulting (partnership coordinator)

Kevin Crockett directs Noel-Levitz consulting services and oversees the firm's 45+ full-time and associate consultants. He also works directly with campuses on strategy development for admissions, marketing, recruitment, and student financial aid.

An experienced enrollment manager, Mr. Crockett has served institutions such as Chapman University (CA), North Park University (IL), Baylor University (TX), Transylvania University (KY), Southern Illinois University, and University of Maine Augusta (ME). His clients' enrollment success is extraordinary, with gains in first-year student enrollment ranging from 15-40 percent.

Prior to joining Noel-Levitz, Mr. Crockett served as dean of admissions and enrollment management at Cornell College (IA), where he enrolled the three largest consecutive entering classes in school history—culminating in record opening enrollment. His national reputation includes receiving the CASE “Heavy Hitter” designation for outstanding workshop presenters and co-authoring “The Admissions Office Goes Scientific” (*Planning for Higher Education*, Vol. 22, No. 1).

Mr. Crockett holds an M.A. in higher education administration from the University of Iowa with concentrations in policy analysis and leadership studies.

Sarah Coen, associate consultant

Sarah E. Coen consults for Noel-Levitz while also serving as director of admissions at Transylvania University (KY). Her current duties at Transylvania include developing, implementing, and evaluating all facets of the university’s enrollment management plan, as well establishing and meeting net tuition revenue goals. During her tenure at Transylvania, she has helped engineer the largest gains in applications, freshman enrollment, and net revenue in the university’s history.

Ms. Coen brings a decade of experience in student recruitment to her consulting position. In addition to her current position, she has served as director of admissions at Commonwealth College (VA) and assistant director of admissions at the University of Michigan–Dearborn (MI). She received the Employee of the Year Award at Commonwealth College in 1994. Prior to her work in college admissions, Ms. Coen worked with the American Red Cross as a public relations specialist.

Ms. Coen holds a master’s degree in public administration from Central Michigan University and is an executive board member of Kentucky Association of College Admissions Counseling and is a member of the National Association for College Admission Counseling.

Paula Compton, associate consultant

Dr. Paula Compton consults for Noel-Levitz from her post as special assistant to the associate vice president for enrollment services at The Ohio State University. As an associate consultant, she offers more than 20 years of experience in higher education, including undergraduate and graduate recruitment.

Previously, Dr. Compton served as senior director of undergraduate admission and student financial aid at the University of Toledo (OH). Dr. Compton also had a previous tenure at The Ohio State University as the associate director of admissions, and worked at the Graduate School of Business Administration at Miami University of Ohio. She has extensive experience in directing admissions programs, including marketing, recruitment, enrollment, and staff development.

Dr. Compton has been president of the Ohio Association of College Admissions Counselors and has chaired the Ohio ACT assembly. She has received the Legendary Service Award from The Ohio State University.

Dr. Compton holds a Ph.D. in administration from The Ohio State University.

Jill Conlon, associate consultant

Jill Conlon consults directly with campuses on the effective administration of enrollment management programs. She applies her expertise in recruitment strategy, market research, and program management to achieve the specific goals and requirements of client institutions nationwide.

Offering 16 years of enrollment experience, Ms. Conlon has built an impressive track record. Earlier in her career, she served as director and associate dean of admissions at SUNY-Geneseo (NY) and as acting director of undergraduate admissions at the University of Massachusetts Boston. More recently, she has served as a specialist in inquiry pool management and development for institutions using our Forecast*Plus*TM predictive modeling program.

Ms. Conlon's success is marked by careful research, planning, evaluation, and reporting through each phase of the recruitment cycle. Her experience includes recruiting targeted student subgroups, strengthening recruitment communications, and managing the selection process of freshman, transfer, and international student applicants.

Ms. Conlon holds an M.S. from Rochester Institute of Technology.

Craig Engel, vice president

Craig Engel works directly with campuses on the effective administration of their enrollment management programs. Mr. Engel has implemented successful strategies with over 50 institutions, including four-year, two-year, public, private, liberal arts, graduate/professional, and vocational colleges. His areas of expertise include communications system design, database and inquiry pool management, staff training and development, transfer recruitment techniques, and strategic enrollment planning.

Offering 16 years of hands-on experience in enrollment management, Mr. Engel's career has focused exclusively on building and shaping enrollments — first on campuses, and now as a consultant. His clients have included institutions such as The Ohio State University (OH), Florida State University (FL), Western New England College of Law (MA), Palmer College of Chiropractic (IA), and SUNY-Albany (NY), where enrollment increased while incoming students' average SAT scores rose 16 points in one year.

Prior to joining Noel-Levitz, Mr. Engel held campus-based positions for eight years, serving as dean of admissions and financial aid at Golden Gate University School of Law (CA) and in admissions posts at the University of Iowa and Cornell College (IA).

Mr. Engel holds an M.A. in higher education administration from the University of Iowa.

Dan David García, associate consultant

Mr. Dan David García serves as an associate consultant for Noel-Levitz and is executive director of enrollment services and student affairs at the University of Washington, Tacoma.

Mr. García is responsible for directing the university's enrollment management initiatives, and assists with marketing, publications, advertising, and campus relations. Within a year of assuming his current position, Mr. García's efforts have increased the number of applications by 66 percent, and helped the institution reach enrollment goals for the first time in five years. In addition, Mr. García oversees such instrumental campus departments as the Office of Admissions and Advising, the Office of the Registrar, the Student Counseling Center, and the Office of Financial Aid.

He is an active participant in such national and regional organizations as the American Association of Collegiate Registrars and Admissions Officers (AACRAO) and the Texas Association of Chicanos in Higher Education (TACHE).

Mr. García received his master's degree from the University of Houston-Clear Lake.

Kent Hopkins, associate vice president

Kent Hopkins consults directly with campuses on enrollment strategy and the use of new technologies for enrollment and net revenue management. His areas of expertise include the many aspects associated with strategic enrollment planning.

Mr. Hopkins brings a strong track record to his consultations, offering 10 years of experience in enrollment management. As dean of enrollment management for the University of Toledo (OH), he doubled the number of high-ability students while increasing the enrollments of students of color, transfer students, adult students, and overall freshman class size, along with the university's retention rate. Prior to his tenure at Toledo, he served as director of undergraduate admission at Saint Louis University (MO), where freshman enrollment and ethnic diversity increased 17 percent.

Among Mr. Hopkins' areas of expertise are communication systems design, scholarship planning, territorial management, systems development, marketing and advertising, and inquiry pool management. An excellent speaker, Mr. Hopkins has presented numerous seminars at national and regional professional development conferences. His experience as an instructor includes teaching the First-Year Academic Orientation course at the University of Toledo. Earlier in his career, he served as pre-enrollment admissions/financial aid advisor and admissions counselor at Iowa State University.

Mr. Hopkins holds an M.S. in higher education administration from Iowa State University.

Victoria LaFore, senior consultant

As a senior Noel-Levitz consultant, Victoria LaFore offers extensive recruitment and admissions experience in higher education. Ms. LaFore specializes in the communication processes involved in recruiting and enrolling college and university students.

Ms. LaFore most recently served as dean of admission and financial aid at Bryant College (RI). In this position, she developed comprehensive, market-sensitive recruitment plans and identified cost-effective approaches to meet the college's recruitment and retention goals. Her achievements at the college include a 12 percent rise in freshman applications, a 33 percent

increase in average SAT scores for entering freshmen, and a six percent increase in student diversity.

A member of several prominent education organizations, Ms. LaFore has given admissions presentations for the Law School Admissions Council and served as regional committee chair for the New England Law Schools Association. She has also led national discussions on admissions, enrollment, and recruitment strategies at the Pre-Law Advisors National Conference.

Ms. LaFore received an M.B.A. from the University of Massachusetts at Amherst.

James Mager, associate consultant

James Mager consults directly from his post as assistant vice president for enrollment management at The Ohio State University (OH). As a senior consultant for Noel-Levitz, his areas of specialization include strategic planning, admissions and retention research, and admissions office strategy and operations.

Dr. Mager offers 20 years of experience in a variety of enrollment management positions, all at Ohio State. Currently, he leads the University's recruitment and retention efforts, overseeing the offices of admissions, financial aid, and the university registrar. Previously he served as director of admissions and financial aid and as a systems analyst.

Enrollment results credited to Dr. Mager's leadership have included higher quality freshman classes, greater ethnic and geographic diversity, and stronger retention and graduation rates. In addition, he has been instrumental in helping Ohio State to implement selective admissions policies.

Dr. Mager received his doctorate in industrial systems engineering from Ohio State. He is a member of the American Association of College Registrars and Admissions Officers (AACRAO).

Roger Swanson, senior vice president

Roger Swanson consults directly with campuses on the effective administration of enrollment management programs. Offering 37 years of higher education experience, Dr. Swanson specializes in strategic enrollment planning, organizational structure, and professional and staff development. He oversees planning of the three national Noel-Levitz conferences, our new online master's degree and certificate programs in enrollment management (2001), and the executive coaching program for enrollment managers.

Dr. Swanson has consulted with institutions such as Indiana University Northwest (IN), the University of Hawaii (HI), North Harris Community College (TX), and the University of Alaska Southeast (AK). Prior to joining Noel-Levitz, Dr. Swanson served more than 20 years in on-campus enrollment management positions, holding university appointments through the dean and vice president level in both academic and student affairs at California Polytechnic State University (San Luis Obispo), Arizona State University (AZ), and the University of Illinois (IL).

Dr. Swanson served for four years as associate executive director of AACRAO, the American Association of Collegiate Registrars and Admissions Officers. He also received the Crystal Apple Award for excellence in teaching from the Council for Advancement and Support of Education (CASE).

Among Dr. Swanson's 150+ professional publications and presentations are three books, *The Freshman Writes* (on college-level composition), *Training New College Admissions Recruiters: A Guide for Survival and Success*, and *Becoming a Leader in Enrollment Services: A Development Guide for the Higher Education Professional*.

Dr. Swanson received his Ph.D. from the University of Illinois.

Terry Whittum, associate consultant

Terry Whittum consults for Noel-Levitz while serving as director of the Distance Learning Enrollment Office at Embry-Riddle Aeronautical University (FL). During Mr. Whittum's 20-year career, he has gained extensive experience in the areas of recruitment, admissions, enrollment, marketing, adult education, distance learning, and retention.

Prior to his current position, Mr. Whittum served as director of admissions and enrollment management for Embry-Riddle's campus in Prescott, Arizona. Under his leadership, new student enrollment increased more than 20 percent and average SAT scores increased by 20 points. Mr. Whittum has also held director of admissions positions at Bethel College (TN), and Daniel Webster College (NH), where his efforts increased applications by 14 percent.

Mr. Whittum frequently presents at such events as the North American Enrollment Management Institute, the Annual Conference of the National Association of College Admission Counseling, and the National Conference on Student Retention.

Mr. Whittum received his master's degree in organization and management from Capella University.

Michael White, associate consultant

Michael White consults directly with campuses from his post as vice president for administration at Coe College (IA). A former Noel-Levitz vice president, his area of expertise is the effective administration of enrollment management programs, including planning, strategy development, and project management for admissions, marketing, and student financial aid.

Mr. White has served a broad spectrum of institutions, including the University of Arkansas, University of Maine-Fort Kent, Webster University (MO), Georgetown College (KY), and West Virginia Wesleyan College, where new student enrollment increased 28 percent. Under his leadership at Coe College, where he has also served as dean of admissions and financial aid, Coe's total college enrollment rose 27 percent over a four-year period. Mr. White's 16 years of enrollment experience include serving as director of financial aid and assistant dean for admissions, leading CASE financial aid workshops, and conducting many admissions and financial aid seminars.

Mr. White holds an M.A. from the University of Iowa and is a member of the National Association for College Admission Counseling (NACAC) and the National Association of Student Financial Aid Administrators (NASFAA).

Market Research Consultants

Scott Bodfish, associate vice president

Scott Bodfish is an executive consultant within the market research division of Noel-Levitz. With more than 14 years of experience as a strategic planner and institutional researcher, Mr. Bodfish is responsible for maintaining and improving the effectiveness of Noel-Levitz research services and identifying additional data sources in order to enhance and customize institutional research approaches.

With particular interest in researching the student college choice process, Mr. Bodfish has thorough knowledge of several areas within enrollment management and retention research. These include policy formation; predictive modeling of inquiries, applicants, and matriculants; financial aid modeling and analysis; non-enrolling students; and student success and retention.

Prior to joining Noel-Levitz, Mr. Bodfish has served as director of institutional research and planning support at Wilkes University (PA) and Sweet Briar College (VA), where enrollment management teams achieved 20 percent average increases in freshman class size. He has also taught philosophy courses at institutions such as St. Louis Community College (MO), the University of Missouri-Columbia (MO), and Randolph-Macon Women's College (VA).

Mr. Bodfish holds an M.A. from Washington University (MO).

Kathryn Karford, executive consultant

Kathryn Karford consults directly with institutions on market research, marketing strategy, and multimedia communications development. With over 15 years of national consumer product marketing experience, she is adept at analyzing student/user populations and assisting clients in developing cogent marketing messages.

Ms. Karford's areas of expertise include online and adult learning, as well as public relations strategy and new media technology. Within the Market Research Division at Noel-Levitz, she conducts quantitative and qualitative research including national surveys, on-campus interviews and focus groups. Her clients include a variety of institutions such as the University of South Florida (FL), Baker University (KS), Metropolitan State College (CO), and Keystone College (PA).

Prior to joining Noel-Levitz, Ms. Karford was manager of new product development and marketing for U.S. Bank. Previously, she owned her own marketing firm and managed consumer product accounts for Grey Advertising in Los Angeles. For several years she taught a class on "Smart Card Technology" at the University of Colorado, Denver.

Ms. Karford is a graduate of Brigham Young University (UT).

Greg Lincoln, senior consultant

As senior marketing consultant for Noel-Levitz, Greg Lincoln is instrumental in assisting colleges and universities with determining their position in the higher education marketplace. He specializes in educational research, data analysis, and marketing research methods. While the topics of his research vary, recent studies have included the effectiveness of college Web sites, student satisfaction, and university image. He also has a comprehensive command of computer software applications designed specifically for statistical analysis.

Mr. Lincoln has conducted research for a number of institutions, including Worcester Polytechnical Institute (MA), Washington and Jefferson College (PA), and the University of Detroit, Mercy (MI). He has also presented at national and international events, including presentations for the American Marketing Association (AMA) and the International Communication Association (ICA).

Mr. Lincoln is currently pursuing a master's degree in sociology from the University of Nebraska at Omaha.

LTC Enrollment Management Assessment Consultants

David S. Crockett, senior vice president (partnership coordinator)

David Crockett is a national authority on enrollment management and student retention offering nearly 40 years of experience in higher education marketing. He has consulted directly with hundreds of colleges and universities, conducted numerous national studies on effective recruitment, retention, and advising practices, and has consistently been in demand as a speaker and presenter.

Mr. Crockett has served client institutions ranging from the University of Texas San Antonio (TX) to Morehead State University (KY) to the Eastern Iowa Community College District (IA) to Eastern New Mexico University (NM). He directed successful Noel-Levitz projects with the Kentucky Community and Technical College System, Indiana Community College System, and Minnesota Technical College System. Prior to joining Noel-Levitz, he served 18 years as vice president at the American College Testing Program (ACT), where he planned and directed national marketing, public relations, service, operational, and consulting activities related to ACT's numerous programs and services.

A long-time member of the National Academic Advising Association (NACADA), Mr. Crockett developed the association's national recognition program for advising excellence and has been published widely in student retention and academic advising journals. His campus-based experience includes holding enrollment management positions at Baldwin Wallace College (OH) and Kenyon College (OH).

Mr. Crockett holds an M.A. from the University of Maryland and has completed additional graduate study in higher education at the University of Iowa.

David Trites, associate consultant

David Trites, associate consultant, consults for Noel-Levitz while serving as dean of student services at Alexandria Technical College (MN), where he oversees the offices of recruitment, admissions, financial aid, and student life. He is presently serving as interim president at Rainy River Community College (MN).

As a consultant, Dr. Trites offers expertise in assessing organizational effectiveness, applying Baldrige approaches to continuous improvement, and converting prospective students to enrolled students. Dr. Trites' 17-year career in higher education began and remains in enrollment management positions. He served as enrollment management coordinator and total quality manager before assuming his current position as dean.

Through his leadership, Dr. Trites has increased enrollment by 18 percent at Alexandria Technical College, and the school is consistently enrolling the largest, most diversified freshman classes in its history. Dr. Trites has used his knowledge of recruitment and enrollment to counsel institutions such as St. Paul Technical College (MN), Cowley County Community College (KS), the Dunwoody Institute (MN), and Southern Arkansas University Tech (AR). Dr. Trites is active in the American Association for Collegiate Registrars and Admissions Officers (AACRAO), and the National Certified Counselor Association (NCCA), among other national and regional organizations.

Dr. Trites holds a doctorate in educational leadership from the University of Minnesota (MN).

Candace Vancko, associate consultant

Candace Vancko, senior associate consultant, consults directly from her post as president of Delhi College (NY). As a senior consultant for Noel-Levitz, she specializes in marketing and recruiting for two-year colleges and universities, offering nearly 25 years of experience with two-year institutions.

Dr. Vancko's clients have included such institutions as Brainard Technical College (MN), Middlesex Community College (MA), and Lansing Community College (MI). Previously Dr. Vancko served as vice president for enrollment services at Hocking College (OH), where she led a series of highly successful enrollment campaigns while managing a budget in excess of \$12 million. In addition, she served as a faculty member for Hocking and an adjunct faculty member for the Ohio University College of Communications.

An excellent speaker, Dr. Vancko has presented frequently on effective marketing and recruiting practices for two-year institutions. She has been recognized throughout her career for excellence in enrollment management and is actively involved in several regional and national associations, including the American Association of Community Colleges.

Dr. Vancko received her doctorate in higher education administration from Ohio University

LTC Campus Mission Delineation and Program Duplication Assessment

Carol Aslanian, associate, Paul Elsner and Associates

Carol Aslanian is senior advisor for adult learning at The College Board, New York, New York, and vice president – Sales for Protocol National Inc. Protocol offers colleges an integrated management information system focusing on student, human resources, and financials. For the past two decades, she has directed the Community Assessment Program (CAP), a higher education analysis service which assists state agencies, colleges and universities, and other institutions in assessing the supply and demand for postsecondary learning in their communities. Since 1980, she has directed assessments for more than 300 institutions throughout the United States. These include individual colleges, state coordinating boards, regional consortia of colleges, multi-institutional centers, and chambers of commerce. She has designed the investigations, developed the necessary data collection instruments and procedures, and continues to refine CAP as part of an ongoing resource in strategy and policy analysis for higher education. She has also served as Director of the Office of Community College Relations for the College Board and assisted in enhancing the mission of the Board in service to community colleges.

Ms. Aslanian is a national authority on the characteristics and learning patterns of adult students and has made hundreds of presentations to educational institutions, state agencies, and national associations, focusing on her major area of expertise – access to higher education for place-bound and time-bound students. During the past decade, she has engaged in various activities related to meeting the needs of learners, including those that helped colleges identify new locations, alternative scheduling, and distance education instructional options. She has both designed market studies to assist colleges to enhance their share of the adult student market as well as conducted onsite visits and consultations to analyze the current and potential status of institutions in meeting the demands of adult students.

Ms. Aslanian is a past board member of Elderhostel. She was selected by the National Council on Community Services and Continuing Education as the “Person of the Year – Outside the Field,” for her national contributions to the field of community services and continuing education. She received the Association for Continuing Higher Education Special Recognition Award for dedication and service in the field of continuing education. She is also past chair and current member of the Advisory Council for the College of Human Ecology at Cornell University. Further, Ms. Aslanian co-authored two reports that described the causes and timing of adult learning – *Americans in Transition: Life Changes as Reasons for Adult Learning* and the learning patterns of adult learners – *How Americans in Transition Study for College Credit*. In a Jossey-Bass publication titled *Higher Education in Partnership with Industry*, Ms. Aslanian served as co-author focusing her writing on the development of contract education programs between colleges and employers. In another Jossey-Bass publication, she applied her extensive knowledge of the experiences in program evaluation by serving as editor of *Improving Education Evaluation Methods: Impact on Policy*. In 2001, her nationwide study on adult students – ADULT STUDENTS TODAY – was published by the College Board.

Ms. Aslanian received her degrees from Cornell University and Harvard University.

Paul Elsner, president, Paul Elsner and Associates

Paul Elsner was chancellor of the Maricopa County Community College District 1977-1999. He received his doctorate from Stanford University in 1964. Elsner graduated from Harvard's Institute for Educational Management. The Maricopa Community Colleges are internationally recognized for leading-edge performance in technology transformation, workforce training, and economic development.

Dr. Elsner is the immediate past chair of the Board of Trustees for the Educational Testing Service (ETS), serves on the Fetzer Institute's Formation Advisory group, served on the Board of Directors of the American Association of Community Colleges (AACCC) and as president of the Board of Trustees for American College Testing (ACT). He was elected to the Board of Directors of the American Council on International Intercultural Education, is a member of the Board of Directors, League for Innovation in the Community Colleges, and also served as League president.

Dr. Elsner also serves on the Board of Advisors of the American Student Association of Community Colleges, the American Council on Education's (ACE) Commission on Leadership Development, and the ACE's Business Higher Education Forum. He has served as a member of the Invest Learning Community College Advisory Board, and is a past member of Executive Committee of Campus Compact – The Project for Public and Community Service, Education Commission of the States.

Dr. Elsner also served on the Governing Board of the New Standards Project that operated on a grant awarded by the Pew Charitable Trusts and the John D. & Catherine T. MacArthur Foundation. He was appointed to the New York Regents Commission on Higher Education, served as a Board Member of the American Association of Higher Education (AAHE) and for the American Council on Education. Dr. Elsner also serves on the advisory boards of Eduprise, Protocol, and the National Governor's Association and the American Society of Training and Development's Commission on Technology and Adult Learning. This past year his consultancies and speaking took him to China, South Africa, The Netherlands, Ireland, Barcelona, Japan, and the United Arab Emirates.

Dr. Elsner is a recipient of the Anderson Medal for co-founding a nationally recognized partnership, The Think Tank. He is the author of a 21st Century morality play on the future of higher education entitled *Le Movement*. Dr. Elsner was listed as one of the most effective college leaders in the nation in the November 1996 edition of *The Chronicle of Higher Education* and he was cited as one of the twenty most influential leaders by *Change Magazine*. He has received numerous awards, including the Association of Community College Trustees Marie Y. Martin Chief Executive Officer Award, the Valley Leadership Visionary Award for positive and long-term community involvement, an Honorary Doctorate in Humane Letters from Arizona State University, an Honorary Professorship from La Universidad Autonoma de Guadalajara, Guadalajara, Mexico, the American Association of Community Colleges Leadership Award, and the 1999 McGraw-Hill Harold W. McGraw, Jr. Prize in Education. In addition, he was presented with an honorary doctorate of Humane Letters from Northern Arizona University at their commencement ceremony in May 2000.

David R. Pierce, associate, Paul Elsner and Associates

Dr. David R. Pierce retired as president and CEO of the American Association of Community Colleges in August 2000. He continues to be involved in higher education and community colleges through professional affiliations that span a wide variety of activities.

In addition to various consultant activities with community colleges, David Pierce serves as a Distinguished Senior Fellow with the Education Commission of the States, as a special consultant to the president of Franklin University, and as executive director of COMBASE. He also has Adjunct Faculty appointments at both Iowa State University and the University of Illinois and serves as a member of the Board both for the Sedona Group and Phi Theta Kappa, the international honor society for community colleges.

During his career David Pierce has served professionally in California, Iowa, Illinois, Virginia, and Washington, DC. His CEO positions included serving as president of North Iowa Community College, executive director of the Illinois Community College Board, Chancellor of the Virginia Community Colleges, and president of the American Association of Community Colleges.

Dr. Pierce received his Associate Degree from Fullerton College in California, Bachelors and Masters Degrees from California State University at Long Beach, and Masters and Doctors degrees from Purdue University.

A native of Oklahoma, Dr. Pierce now lives in Normal, Illinois with his wife, Maureen.

Donald E. Puyear, associate, Paul Elsner and Associates

Dr. Puyear brings the knowledge and experience gained in over three decades of successful community college leadership. Donald Puyear has served as president of three Virginia community colleges, vice chancellor of the Virginia Community College System, and executive director of the State Board of Directors for Community Colleges of Arizona.

Dr. Donald Puyear has the following notable accomplishments during his professional career:

- Successfully established two new community colleges and led a third to prominence within the Virginia Community College System.
- Pioneered development of strong accountability reporting prior to this becoming common practice.
- Developed high school to community college occupational education articulation before Tech Prep arrived on the national scene.
- Provided leadership in educational program review and development, student services, institutional research, and data services as vice chancellor of the Virginia Community College System.
- Developed the concept of the Provisional Community College District that has been established as a vehicle for serving the community college educational needs of Arizona

counties that do not meet the threshold population or assessed valuation criteria to form a regular community college district.

- Written and spoken extensively on community college issues.

Dr. Puyear holds B.S. and M.S. degrees in chemical engineering from University of Missouri, School of Mines and Metallurgy, Rolla, Missouri and a Ph.D. from Virginia Polytechnic Institute, Blacksburg, Virginia.

Project Administration

Patricia A. Harp, senior administrator

As a senior administrator, Patricia Harp is responsible for the development, coordination, and management of Noel-Levitz service proposals to higher education systems. She is instrumental in the research and development of custom proposals for campuses and systemwide projects.

Most recently, Ms. Harp has worked with the Minnesota State Colleges and Universities System, Kentucky Community and Technical College System, the Indiana Commission of Higher Education, the Tennessee Board of Regents, and the University System of Maryland.

Ms. Harp also oversees the day-to-day activities of the enrollment sales team and analyzes overall marketing and sales effectiveness.

Ms. Harp holds an M.B.A. from the University of Iowa.

Thomas E. Williams, president and CEO

Thomas Williams is one of higher education's leading authorities on enrollment management, offering a track record that few people can emulate. With 29 years of experience in enrollment management, he has consulted directly with more than 500 colleges and universities, has engineered numerous enrollment successes, and has been a driving force in elevating Noel-Levitz to its leadership role as higher education's largest enrollment management consulting firm.

As a leading definer of effective enrollment management practice, Mr. Williams' areas of expertise include enrollment planning, strategic planning, recruitment communications systems, pricing and financial aid strategy, and staff training and development. His clients have encompassed a broad spectrum of institutions, including the University of California-Riverside (CA), Gallaudet University (DC), Miami-Dade Community College (FL), and Clemson University (SC). Prior to joining Noel-Levitz, Mr. Williams led record-breaking recruitment campaigns at Adrian College (MI), doubling freshman enrollment in two years' time.

Each year, Mr. Williams consults with dozens of campuses and presents research to hundreds of enrollment professionals at professional association meetings and at events convened by Noel-Levitz. He is also a frequent contributor to *Strategies*, the Noel-Levitz newsletter on effective practices in enrollment management.

Mr. Williams is a certified financial planner and holds an M.B.A. from the University of South Dakota.

Experience and Capabilities

We are confident that we can meet Louisiana Board of Regent's goal to develop enrollment plans for each of the 13 campuses, conduct a successful market research initiative, and conduct an enrollment management assessment of the LTC. In the past we have provided our clients with the tools and direction required to achieve desired increases in enrollment numbers, academic profile, student body diversity, net operating revenue, and retention. This past year:

- Noel-Levitz client institutions that were seeking increases in first-year student enrollment through use of the firm's sustained on-site consulting services realized an average 15.3 percent gain in first-year students.
- Average freshman SAT composite increased 29 points for a state university in the Northeast.
- In-state freshmen rose 31 percent for a private college in the West.
- Out-of-state freshmen are up 19.4 percent for a state university in the Northeast.
- Noel-Levitz client institutions that were seeking increases in net operating revenue using the firm's financial aid service, the Enrollment & Revenue Management System™, realized an average \$748,000 gain in net operating revenue.

Outlined below is a summary of our experience with system and multiple campus projects, two and four-year institutions and the Louisiana higher education market.

System and multiple campus projects

Noel-Levitz has extensive experience facilitating enrollment management projects with systems and multiple campuses. Recent work has included:

- Louisiana Board of Regents
- North Carolina State College System
- Indiana Community Colleges (via Indiana Commission of Higher Education System)
- Minnesota State Colleges and Universities System (MnSCU)
- Kentucky Community and Technical College System

Depending on individual client needs, the following is a representative list of project elements that have been incorporated in our system projects:

- Recruitment consulting
- Retention consulting
- Individual Enrollment Opportunities Analyses
- Annual and strategic enrollment planning
- Staff training and development
- Automation of recruitment and telecounseling functions
- Systemwide and institution-specific market research

- Recruitment publications and Web site development
- Retention tools

Similar projects and references

While the success of our consultations can be measured in many ways, the most telling indicators are improved recruitment and retention outcomes. Our work has effected significant change not only in enrollment numbers but also in academic profile, retention, student diversity, and distribution of students by sex, academic major, and geography. Below is a sampling of some of our successful partnerships.

North Carolina State College System

Dr. Judith Pulley

Former Vice President for Planning

(919) 962-4617

Overall, the North Carolina system increased enrollment by 12.1 percent over last year. Outlined below is the scope of project for each institution.

Elizabeth City State University

Elizabeth City created and implemented an annual recruitment plan. This planning process included setting funnel and territory goals, as well as new strategy development for inquiry generation, segmented written communications, telecounseling, qualifying and grading, campus visitations, data tracking and reporting, and territory management. In addition, market research was conducted and resulted in the development of a marketing theme and key messages. As a result of these and other efforts, Elizabeth City State increased first year student enrollment 12.3 percent over fall 1999. In addition, they increased transfer enrollment by 6.1 percent over fall 1999.

North Carolina Agricultural and Technical

North Carolina A & T followed fall 1999's freshman enrollment record with another record breaking year! As with Elizabeth City State, A & T developed an integrated enrollment plan that supported the tracking of all recruitment activities while supporting the qualifying and grading of its inquiry pool. In addition, on-going consultation addressed the transition of leadership in the Vice President of Academic Affairs, Vice President of Enrollment Management, and Director of Admissions positions. A chief goal, increasing diversity, was achieved by increasing minority (white) enrollment by 27.7 percent. In addition, the ambitious transfer goal was nearly achieved. A&T increased the number of transfer students by 9.8 percent over 1999.

North Carolina Central University

A main focus of the North Carolina Central project was to completely reconstruct the recruitment and admission operation. A primary objective was to incorporate new student enrollment goals

into the development of key strategies and action plans. One of these strategies included developing the first-ever inquiry pool. Additionally, the University introduced recruitment publications to be sent at the inquiry and admit stages. Some other key activities included identifying primary, secondary and tertiary in-state markets and developing enrollment goals within those markets in an effort to support overall enrollment goals. By reconstructing recruitment regions, counseling staff were able to develop a territory/relationship management program to meet specific regional recruitment goals. Another key activity included implementing a state-of-the-art telecounseling program at the admit level to strengthen communication between the University and admitted students and their family members. These strategies assisted NCCU in increasing freshman enrollment by 13.1 percent—and transfer enrollment by 8 percent over 1999 enrollment figures.

University of North Carolina at Pembroke

Of the four universities, Pembroke achieved the most dramatic growth in all categories. Pembroke increased freshman enrollment by 20.3 percent and transfer students by 23.7 percent. Graduate enrollment increased by 28 percent and overall enrollment was up by 9.3 percent. The average freshman GPA also increased, from 2.89 in 1999 to 2.99 in 2000. In addition, Pembroke enrolled more freshman students from more North Carolina counties, states, and countries than ever before.

Indiana Commission of Higher Education

Ms. Cheryl Orr
Communications Consultant
(765) 523-2550

We are assisting the Indiana Commission of Higher Education with the development of enrollment strategies and plans for the 24 newly established Indiana community colleges. We have developed a customized plan of action that will enable us to:

- Smoothly grandfather (integrate) all 24 community colleges over a three-year period;
- Assist each college to gain control over enrollment by developing the capability to consistently achieve annual enrollment goals through improved marketing and recruiting strategies;
- Facilitate the development of individual college enrollment management plans that incorporate both annual and long-range strategies and tactics to achieve enrollment goals for new students;
- Provide opportunities for training and professional development in state-of-the-art enrollment management, leadership, and change management in order to institutionalize enrollment management as a way of doing business on each campus; and
- Help each college to become self-sufficient in enrollment management by the conclusion of the project so that enrollment goals can be achieved in the future.

During 2000-2001, the first four new community colleges achieved an aggregate enrollment of over 2,000 their first year of operation.

Kentucky Community and Technical College System

Dr. Michael McCall
President
(859) 246-3146

Noel-Levitz has recently partnered with the Kentucky Community and Technical College System (KCTCS) to assist in increasing enrollment among community colleges statewide. KCTCS posted record enrollments this fall. In fact, systemwide enrollment has increased from 45,988 for fall 1999, to 50,015 for fall 2000 and 60,031 for fall 2001. This represents a 30.5% increase over the past two years.

Minnesota State Colleges and Universities (MnSCU)

Dr. Linda Kohl
Former Associate Vice Chancellor for Public Affairs
(651) 296-9595

Noel-Levitz partnered with the Minnesota State College and State University System to provide research and consulting services to help their 36 institutions increase market share, inquiry to application conversion rates, application to enrollment yield rates, and overall retention rates. Using a combination of market research, workshops, and consultations we provided MnSCU with the market research data required to support the creation of a systemwide marketing plan.

This support included:

- actionable marketing recommendations/plans for system and individual colleges/universities that include effective strategies and tactics;
- powerful messages targeted to a variety of audience segments and key markets;
- various marketing media and promotional strategies analyses; and
- recommendations to increase the perceived value of a Minnesota education.

References for individual institutions

The Ohio State University - Columbus, Ohio

Mr. Jefferson R. Blackburn-Smith
Associate Director for Undergraduate Admissions
The Ohio State University Main Campus
101A Enarson Hall-154 West 12th Avenue
Columbus, OH 43210
614-292-7605 phone
614-292-4818 fax
jblackbu@fa.adm.ohio-state.edu

Average ACT scores up from 22.8 to 24.7

Our work with The Ohio State University supported the university's long-term strategy to move from virtually open admissions to improve the academic quality and diversity of the entering class. Using our Enrollment Consultation program to enhance recruitment strategies and our ForecastPlus™ predictive modeling system to focus on likely enrollees and our Enrollment & Revenue Management System™ to enhance the impact of financial aid awards, OSU has substantially improved its academic profile, its ethnic and geographic diversity, and its retention by increasing yield rates of targeted students.

Average ACT scores for the entering class have risen from 22.8 to 24.7 since we began the project. Non-resident enrollment has increased from 10.6 percent to 15.8 percent. Under-represented minority enrollments have also increased. First year retention rates have improved from 77 percent to 83 percent.

“Instead of working with huge numbers as in the past, we are targeting the prospects we want and focusing resources on them,” says Jefferson Blackburn-Smith, assistant director of admissions. “With predictive modeling and segmented recruiting messages, the enrollment funnel gets a lot smaller, but the yield of high-ability students is better and so is retention.”

We have worked with The Ohio State University in some capacity from June 1995 through present.

The University of New Mexico - Albuquerque, New Mexico

Dr. Eliseo Torres
Vice President for Student Affairs
University of New Mexico Main Campus
Scholes Hall Room 123
Albuquerque, NM 87131
(505) 277-0952 phone
(505) 277-6099 fax
cheo@unm.edu

54% increase in class size

Since we began consulting with the university, things have begun changing for the better. Incoming classes have increased 54 percent over two years. Student responses to our Student Satisfaction Inventory™ have encouraged the university to invest in new student apartments and a new student union.

Thanks in part to our publications, general consulting, assisting with organized telecounseling, and installing our Enrollment & Revenue Management System™ (and thanks also to the UNM staff) the university has the numbers it wants in admissions and is now implementing campus-wide retention strategies to help students succeed and persevere.

“Noel-Levitz knows what works, and they know how to work fast, too,” says vice president for student affairs Dr. Eliseo Torres. “They really helped us spread the responsibility for attracting

and keeping students across many different departments and divisions. We have a sense now that everyone is pulling together, and it's working.”

Our partnership with University of New Mexico began in July 1997 and lasted until September 1999.

SUNY-Purchase - Purchase, New York

Dr. Ronald D. Herron
Vice President for Student Affairs
Purchase College, State University of New York
CCS 3004
735 Anderson Hill Road
Purchase, NY 10577-1400
914-251-6030 phone
914-251-6034 fax
herron@purchase.edu

22 percent FTE increase

SUNY-Purchase challenged us to apply our broad enrollment management experience to the institution's special situation: the university's conservatories in the visual and performing arts had been enjoying long-term success while liberal arts and science enrollments had been unable to achieve their goals.

The university has seen remarkable growth, with a 22 percent increase in FTEs by working with us to enhance existing admissions and financial aid systems and by implementing new retention strategies. New campus residence halls are now being built and the college's focus has shifted to shaping enrollment from a dramatically expanded applicant pool.

“Noel-Levitz not only changed what we do to manage enrollment, but how we share responsibility, as well,” says Dr. Ronald Herron, vice president for student affairs. “Just two years ago, people on campus would have told you that the Admissions Office was responsible for bringing in students. Now, they would more likely tell you that all of us are responsible for enrolling new students and each of us contributes to helping them succeed here.”

Our partnership with SUNY-Purchase began in March 1997 and lasted until September 1999.

Eastern Iowa Community College District

Dr. Neil Mandsager
Executive Director, Enrollment Management and Marketing
Eastern Iowa Community College District Central Office
306 West River Drive
Davenport, IA 52801-1221
319-336-3309 phone
319-336-3350 fax
nmandsager@eiccd.cc.ia.us

Three colleges, one master plan

Our work with this trio of eastern Iowa community colleges began with developing master admissions and retention programs for the district's three campuses, Clinton Community College, Muscatine Community College, and Scott Community College. After implementing general enrollment management recommendations total enrollment has steadily increased from 6,088 to 6,282.

"Noel-Levitz recognizes that community colleges have unique kinds of enrollment management challenges," says Dr. Neil Mandsager, executive director of enrollment management and marketing. "They see plenty of opportunities for community colleges to manage recruitment and retention in an organized, proactive fashion that delivers results."

Our partnership with Eastern Iowa Community College district began in February 1997 and lasted until January 1999.

Two and four-year public institutions

Noel-Levitz has worked with more than 500 four-year public institutions and 720 two-year public institutions nationwide to increase enrollment and retention rates. These projects have included enrollment, marketing, and retention initiatives. Outlined below are some comments from Presidents at our public client institutions.

"We were interested in building a better infrastructure in our student affairs area, including recruiting, retention, and financial aid. So far, we have seen a good rise in enrollment from 650 to 800 freshmen – an increase of 23 percent. Overall, we've been pleased with the interaction between our people and Noel-Levitz staff."

Dr. Dolores Spikes
President
University of Maryland Eastern Shore (MD)

"In my previous position as provost at the University at Albany, SUNY, we wanted more quality students in a very short timeframe and we got them in partnership with Noel-Levitz. Here at the University of South Florida, there is also a high regard for the firm. Noel-Levitz has been very successful in helping to meet enrollment objectives because they have highly professional consultants."

Dr. Judy Genshaft
President
University of South Florida (FL)

"Immensely helpful! In my previous position as vice president of academic affairs at North Carolina A & T State University, we started seeing increases in retention rates immediately, and the rates continued to grow at a rate of 1 to 2 percent a year. Now that I'm chancellor here, we are looking at similar kinds of processes... to improve student retention and student success."

Dr. Harold Martin
Chancellor
Winston-Salem State University (NC)

“We were concerned about our whole recruitment effort and decided we needed some expertise to look at what was going on and who we should be recruiting. We’ve been very satisfied with our decision to go with Noel-Levitz. We’ve had a good first recruitment season with a really significant increase in first-time freshmen – up 51 percent!”

John Pugh
Chancellor
University of Alaska Southeast (AK)

“We started seeing declining enrollment in our multi-college district, and it became clear that we were competing not only with other institutions but against each other for the same students. We asked Noel-Levitz to help us develop a strategic recruitment marketing plan. We were able to stop the decline in the first year of that plan, and the next two years have seen steady, incremental growth.”

Dr. John T. Blong
Chancellor
Eastern Iowa Community College District (IA)

“Our retention rate continued to drop and we felt we needed someone from the outside to take a look at what we had been doing to improve. Noel-Levitz related very well with our faculty and staff. Their suggestions were very helpful – things we’ve been able to apply to our situation. We’ve seen some notable improvements.”

Dr. Joe Anna Hibler
President
Southwestern Oklahoma State University (OK)

“Focused and beneficial! In my previous position as dean of academic and student services at Mountain Empire Community College in Virginia, we wanted an outside expert to tell us how we were doing with our recruitment and retention plan. Noel-Levitz provided a very systematic and thorough analysis of our college and our enrollment issues – it helped us legitimize and refine our successful program, which yielded record enrollment two years in a row.”

Dr. Debbie Sydow
President
Onondaga Community College (NY)

The Louisiana higher education market

Noel-Levitz has partnered with over 20 of the 34 Louisiana post-secondary institutions. These relationships have provided Noel-Levitz with the opportunity to gain a broader understanding of

the higher education market in Louisiana. Our partnerships with these institutions included assistance achieving recruitment and/or retention excellence through a variety of tools and services.

Past and Present Louisiana Clients

Centenary College of Louisiana

Tulane University

Delgado Community College

University of Louisiana at
Lafayette

Dillard University

University of Louisiana at Monroe

Remington College

University of New Orleans

Education America-Southeast
College of Technology

Xavier University of Louisiana

Grambling State University

Louisiana State University and
Agricultural and Mechanical
College

Louisiana State University at
Alexandria

Louisiana State University at
Eunice

Louisiana Tech University

Loyola University New Orleans

Nicholls State University

Northwestern State University

Nunez Community College

Our Lady of Holy Cross College

Our Lady of the Lake College

Southeastern Louisiana
University

Southern University and
Agricultural and Mechanical
College at Baton Rouge

Southern University at
Shreveport-Bossier City

Cost Statement

Personnel 27 consultant * 205 hours * \$175 = \$968,625

Profit: \$135,075

Travel fees to
be paid by the State: \$195,500

Total: \$1,299,200

Please note that proposal costs do not include travel for the Louisiana participants to the three Noel-Levitz conferences.

Duration of Project

Services to be delivered April 8, 2002 through October 31, 2002.