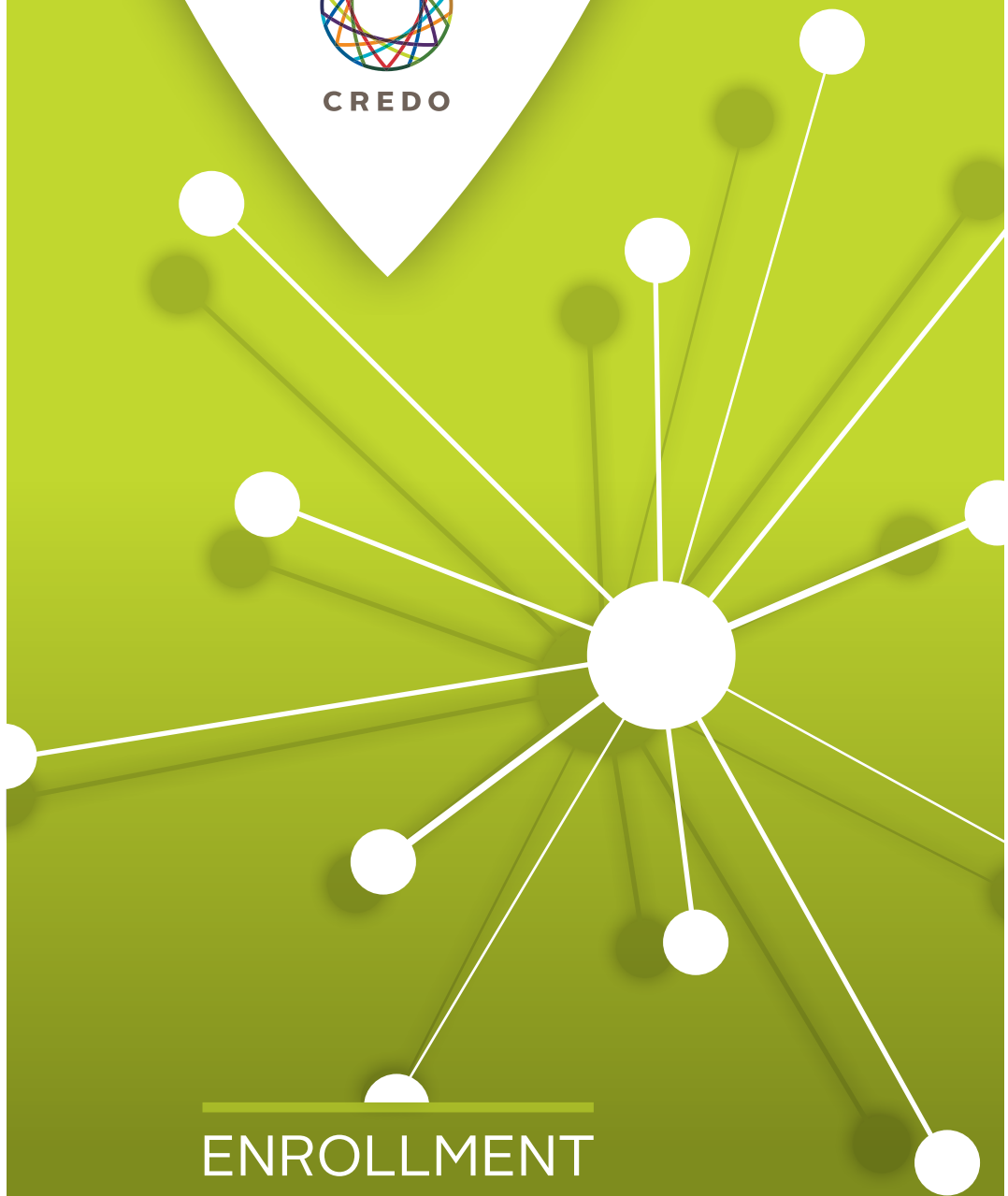


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2015

CREDO ENROLLMENT INSTITUTE

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A Deep Dive into Strategic Enrollment Planning

Overview

ACHIEVING AND MAINTAINING STRATEGIC ENROLLMENT HEALTH requires the right enrollment leadership, team, strategies, and data. It takes a campus to recruit a student, and an effective mobilization of the campus to support that recruitment. This year's Credo Enrollment Institute will take a close look at the scope, key elements, and critical outcomes of a strategic enrollment plan, with ample opportunity for discussion, networking, and planning, so you can go back to campus with a clear understanding of how strategic enrollment planning can lead to strong enrollment health.

WEDNESDAY, JUNE 24

- 8:30 **Session 1** » Why Plan: External Forces, Internal Voices
- 10:15 Mid-morning break
- 10:30 **Session 2** » Internal Partnerships: Building the Campus Capacity to Plan
- 12:00 Hot Topic Lunch
- 1:15 **Session 3** » Comprehensive Enrollment Projections
- 3:00 Networking and Individual Meetings with Credo Team by request
- 4:30 Enrollment Institute Reception

THURSDAY, JUNE 25

- 8:30 **Session 4** » Using the Right Data to Drive Your Strategy
- 10:15 Mid-morning break
- 10:30 **Session 5** » Leveraging Financial Aid Strategy to Drive Growth
- 12:00 Lunch
- 1:15 **Session 6** » Enrollment Planning in Action: A Turnaround Case Study

Wednesday, June 24

SESSION 1 { 8:30 AM }

Why Plan: External Forces, Internal Voices

The new normal requires planning and intentionality. Strategic Enrollment Planning for private colleges and universities today need the right data, the right internal and external perspectives, and the right accountability. In this session we will explore the planning experience that participants have had in the past, understand current best practices, and set the context for the rest of the institute.

- » **Kris Cohen** – Vice President for Strategy & Interim Vice President for Enrollment Solutions, Credo
- » **Tim Fuller** – Senior Vice President/Owner, Credo

SESSION 2 { 10:30 AM }

Internal Partnerships: Building the Campus Capacity to Plan

It takes a campus to recruit, enroll, retain and graduate the right students. As part of your strategic enrollment plan, how do you mobilize the rest of your campus (faculty, athletics, physical plant staff) to do their part? With a case study approach, this session will focus on proven best practice approaches to leveraging campus-wide support for guiding students through the admission process.

- » **Will Lee** – Associate Vice President for Enrollment Solutions, Credo
- » **Adrian Haugabrook** – Vice President for Student Success & Engagement, Wheelock College

SESSION 3 { 1:15 PM }

Comprehensive Enrollment Projections

For most private colleges, net tuition is the most important source of revenue. Forecasting enrollment and net tuition revenue accurately requires the right data and a solid forecasting model that accounts for enrollment, tuition discounting, and other key variables. You will leave better equipped to evaluate your own forecasting efforts.

- » **Tim Fuller** – Senior Vice President/Owner, Credo
- » **Jeff Spear** – Principal, CFO Colleague

Thursday, June 25

SESSION 4 { 8:30 AM }

Using the Right Data to Drive Your Strategy

Data, data, data... We all have so much data! As enrollment leaders, we live in the land of metrics, but what is the right data we should collect and track when developing a strategic enrollment plan? What's the tipping point when your plan is bogged down by too much data, and how do you decide which data is going to make the difference for your institution? This session will examine best practices in data collection and analysis to develop your Strategic Enrollment Plan, measure the effectiveness of the plan, and track overall enrollment growth.

» **Kris Cohen** – Vice President for Strategy & Interim Vice President for Enrollment Solutions, Credo

SESSION 5 { 10:30 AM }

Leveraging Financial Aid Strategy to Drive Growth

The appropriate allocation of precious financial aid resources must be an important element of your strategic enrollment plan, balancing quantitative and qualitative factors as you utilize financial aid to meet enrollment goals. In this session we will review financial aid principles, talk about how admission and financial aid staff work together, consider methods of model building and take time for participants to discuss their experience with financial aid packaging.

» **Tim Fuller** – Senior Vice President/Owner, Credo

» **Korey Compaan** – Dean of Undergraduate Enrollment, Crown College

SESSION 6 { 1:15 PM }

Enrollment Planning in Action: A Turnaround Case Study

What did it take to increase first year enrollment by 38% in one year? In short, a lot of hard work and a willingness to try new things. This case study will provide an overview of the changes that were made in the admission, financial aid, and retention practices that led to a remarkable increase in first year students and the largest undergraduate headcount in 20 years.

» **Eric Fulcomer** – Vice President for Enrollment Management, Rockford University

Kris Cohen, Ph.D.

Vice President for Strategy & Interim Vice President for Enrollment Solutions

Kris has worked in higher education since 1989 with a wide range of institutions. Prior to joining Credo, Kris held the position of Vice President for Enrollment Management at William Paterson University, where she was responsible for providing overall leadership, management, and coordination of the University's undergraduate admissions, graduate admissions, registrar, student enrollment services, and financial aid programs. Kris previously held the Vice President for Enrollment Management position at Bloomfield College, overseeing the Admissions, Marketing and Financial Aid operations. Kris has also served as Dean of Enrollment Management at the Brooklyn Campus of Long Island University, Associate Dean for the Graduate School of Montclair State University, and Assistant Dean for Administration and Student Services at the Graduate School of International Economics and Finance of Brandeis University.

Kris is a graduate of the Ph.D. program in Higher Education Administration at New York University. She received her master's of education degree in Higher Education Administration from Boston University, and her B.A. in Political Science from Hofstra University in New York.

Korey Compaan

Dean of Undergraduate Enrollment, Crown College

Korey has over 15 years of higher education experience in enrollment-related functions for undergraduate programs. In his role as Dean of Undergraduate Enrollment at Crown College in Minnesota, he oversees and coordinates all enrollment initiatives – specifically Admissions, Financial Aid, Athletics, and Retention – for students in the Undergraduate School of Arts and Sciences. Specializing in student financial services and enrollment management, he has a passion for utilizing data and processes to optimize student-perspective services and outcomes.

Prior to his work at Crown, he served as the Director of Financial Aid at William Jessup University where he implemented a system of predictive analytics to maximize student aid eligibility while ensuring efficient internal processing; designed an institutional financial aid leveraging model; and partnered with internal and external entities to strategically develop new aid programs to drive enrollment. He has also served as the Director of Student Financial Services at Fresno Pacific

University. His other accomplishments include serving as a resource for higher education software design and development with Three Rivers Systems and frequently serving as a source for articles in the Chronicle of Higher Education and the New York Times. Korey received his bachelor's degree from Westmont College in Economics.

Eric W. Fulcomer, Ph.D.

Vice President for Enrollment Management, Rockford University

Dr. Eric W. Fulcomer is completing his 22nd year in higher education administration and currently serves as Vice President for Enrollment Management at Rockford University in Illinois. In that role, he oversees undergraduate admission, student accounts, student registration, financial aid, student success and retention, athletics, institutional research, ESL, study abroad, and international programs. Prior to his time at Rockford, Eric served for 19 years at Bluffton University (Ohio), most recently as Vice President for Enrollment Management and Student Life, where he oversaw 11 functional areas including the undergraduate admissions, financial aid and student life offices, managed a divisional budget of more than \$12 million, was a member of the President's Cabinet, and served as Dean of Students.

Eric received his bachelor's degree in English from Eastern Michigan University, a master's degree in College Student Personnel from Bowling Green State University, and his Ph.D. in Higher Education Administration from the University of Toledo.

Tim Fuller

Senior Vice President/Owner, Credo

Tim has been in higher education and consulting since 1980. Prior to joining Credo in 2007 he served as Vice President for Enrollment Management at Houghton College, supervising admission, student financial services, and church relations, in addition to coordinating student persistence efforts. A past president of the North American Coalition for Christian Admission Professionals (NACCAP) and Senior Research Fellow with the Council for Christian Colleges and Universities, Tim earned a B.A. from Houghton College and a M.B.A. at State University of New York at Buffalo. Tim leads the Enrollment and Marketing Solutions teams at Credo and consults in the areas of enrollment management, strategic planning, executive search, and research.

Adrian K. Haugabrook, Ed.D.

Vice President for Student Success & Engagement, Wheelock College

Adrian brings 25 years of higher education and non-profit leadership experience in enrollment management, campus and organizational diversity, college access and success, retention, student success and student affairs. He has presented at regional, national and international conferences and has published on the integration of academic affairs and student affairs in expanding learning opportunities for students. Adrian has served at several institutions including Georgia Southwestern State University, University of West Georgia, Framingham State University, University of Massachusetts Boston and The Education Resources Institute.

Currently, he is the Vice President for Enrollment Management and Student Success and Chief Diversity Officer at Wheelock College in Boston. In this role, Adrian developed and implemented a new student success model that incorporated all recruitment and retention strategies and efforts for the College's undergraduate and graduate students. This has led to an increase in Wheelock's overall enrollment and retention and persistence rates. Wheelock has also been recognized locally, regionally and nationally for the racial/ethnic diversity of its student body and those who are first-generation. Adrian received his Ed.D. in Higher Education Administration from the University of Massachusetts Boston. He earned his M.S. in Social Administration from Georgia Southwestern State University and his bachelor's degree in Criminal Justice from the University of West Georgia.

William Lee

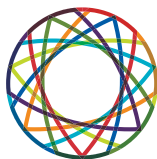
Associate Vice President for Enrollment Solutions, Credo

Will has been in higher education and consulting since 1994. Prior to joining Credo, Will was the Director of Admissions at Queens University of Charlotte, where he also held a variety of other admission positions. During his nine years at Queens University of Charlotte, Will and his team increased the size of the freshman class by 80%. During his career, he has held strategic enrollment positions at the University of Evansville and the Leysin American School in Switzerland. Will earned a B.A. in Communication and a M.S. in Organization Development from Queens University of Charlotte.

Jeff Spear

Senior Affiliate Consultant

Jeff is a Principal for CFO Colleague, a firm that provides financial consulting to private higher education institutions. His particular emphasis is forecasting, utilizing a proprietary model he developed over the years that is now deployed at various institutions. Prior to his work with CFO Colleague, he served as CFO for Mount Vernon Nazarene University (OH) and was the CFO and a Professor of Accounting at his alma mater, Houghton College. His higher education experiences include participation as a finance specialist on various accreditation teams for Middle States and Board membership of ABACC and the CCCU's Commission on CFOs. He also served a term on the NACUBO Small Institutions Council and was named to a joint NACUBO-AGB task force on tuition and discount reporting issues. He continues to speak frequently to various groups about quantitative and analytical issues. Prior to his higher ed career, Jeff was co-owner of an Eastman Kodak spinoff, Controller of an investment banking firm, CFO of a public company and, upon graduating from RIT with his Master's, was an audit and tax specialist at Peat Marwick.



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