



KANSAS STATE UNIVERSITY FOUNDATION: STRATEGIC ENROLLMENT MANAGEMENT PLANNING

BOARD OF TRUSTEE'S MEETING

KANSAS STATE UNIVERSITY
FOUNDATION

BOLDLY ADVANCING **K-STATE** FAMILY

April 20, 2018

1

HURON OVERVIEW

HURON OVERVIEW

- Huron is a global professional services firm committed to achieving sustainable results in partnership with our clients.
- We bring depth of expertise in strategy, technology, operations, advisory services, and analytics to drive lasting and measurable results in the higher education, healthcare, life sciences, and commercial sectors.
- Through focus, passion, and collaboration, Huron provides guidance to support organizations as they contend with the change transforming their industries and businesses.

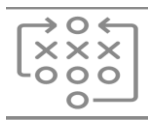


HIGHER EDUCATION OVERVIEW

Today, leaders of higher education institutions are spending more time reacting to market forces to survive, rather than focusing on the essential priorities that help their students and faculty thrive. With our higher education expertise, collaborative mindset, and outcomes-focused approach, we can help. From assessment through implementation, we partner with our clients to identify and realize unique opportunities across all functions and help advance their institutional missions.

AT A GLANCE

- Worked with more than 500 institutions, including all of the top 100 research universities
- Conducted over 7,000 successful engagements
 - In 2016, conducted 1,150 engagements and partnered with 316 institutions
 - 85% YOY repeat clients, 34 new clients
- Professionals have been dedicated to providing professional services and solutions for the industry for more than 25 years



Strategy

Establish vision and develop strategies to measure progress, achieve goals, and improve outcomes



Operations

Assess, design, and implement organizational changes to drive more effectiveness



Student

Improve student success through organizational alignment with mission, strategy, and technology



Technology

Design and implement integrated solutions and programs across your institution



Research

Leverage deep experience to improve support for the research mission -- increasing levels of service, productivity, and compliance

2

CURRENT LANDSCAPE

CURRENT LANDSCAPE

NATIONAL TRENDS

Overall college enrollments in the U.S. have declined for a sixth straight year, according to new data from the National Student Clearinghouse Research Center.



- The 1% decline this fall was due to **undergraduate enrollments**, which fell by nearly 224,000 students, or 1.4%.
 - Among undergraduates, the center found an enrollment decrease of 2.3% for associate-degree seekers, and a 10.7% drop for students pursuing certificates or other nondegree credentials.
 - Enrollments were up 1.5% among four-year-degree seekers.



Graduate and professional programs were up by 24,000 students.

Part-time student enrollments fell by 3.3% while the number of full-time students increased by 0.3 %.

Enrollments were down for **first-time college students**.

- This group saw a 2.3% decline of 63,000 students compared to the previous fall.
- Most of the decrease was due to adult students, with the number of first-time students over the age of 24 dropping by more than 13%.
- 23,000 fewer traditional-age students enrolled in college this fall, a drop of 1%.

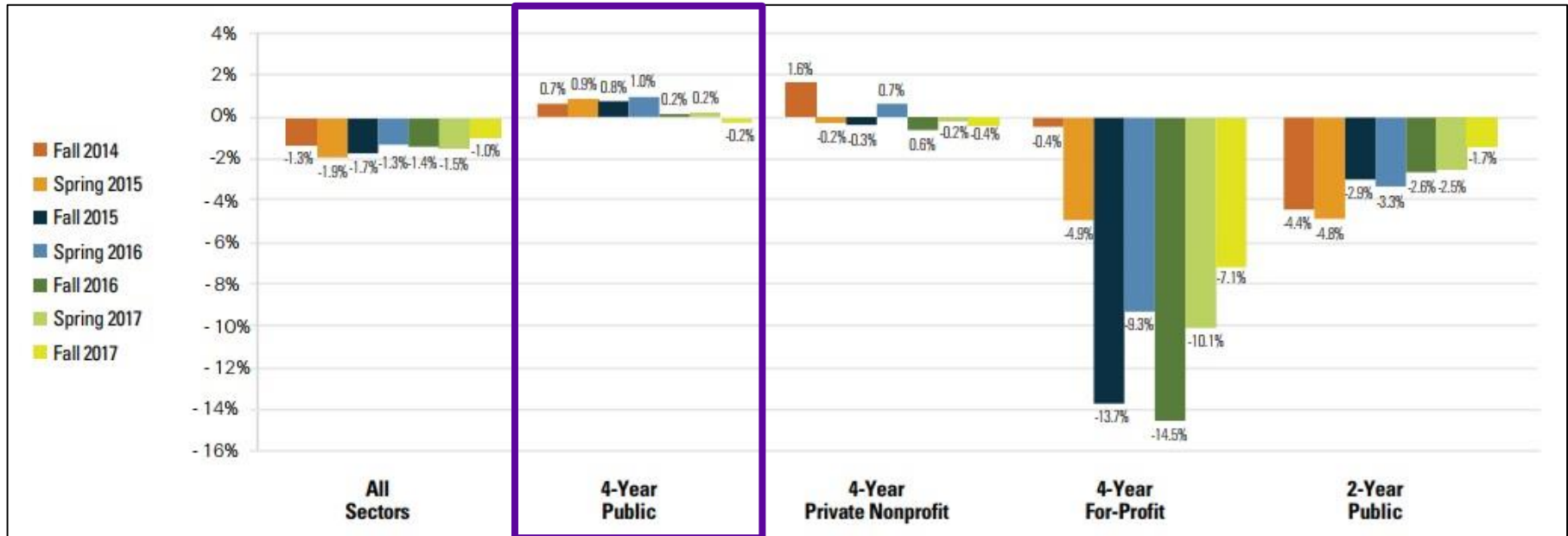


Community Colleges have been the second-hardest-hit sector in recent years with an enrollment decline of 1.7% this fall (97,000 students).

CURRENT LANDSCAPE

NATIONAL TRENDS: FOUR-YEAR PUBLICS

As an institutional segment, four-year public student enrollments have remained flat over the past 3 years, creating downward pressure on institutional budgets and the ability to invest in strategic objectives.



CURRENT LANDSCAPE

DEMOGRAPHIC SHIFTS: NATIONAL

There are more than 2.6 million fewer students enrolled in higher education in the Fall 2017 semester than there were in the Fall of 2011, the most recent peak.



There are fewer Americans at the traditional 18- to 24-year-old age of college-going. This demographic dip is most **acute in the Midwest** and Northeast.

- Meanwhile, an improving economy has **lured students over 24 back into the workforce**. There were 228,000 fewer people over 24 enrolled this fall than last fall, and 1.5 million fewer than there were in the fall of 2010.



According to a survey by the National Association of College and University Business Officers (NACUBO), **price sensitivity and competition** also play a role. 68% of chief business officers of colleges and universities say the rising cost of tuition has cut into enrollment.



The Western Interstate Commission for Higher Education (WICHE) estimates that no upswing is projected until 2023, and it will be very gradual and comprised increasingly of **low-income racial and ethnic minorities** who are the first in their families to go to college, students who tend to need much more financial aid and academic support.



Institutions are also experiencing a **loss of international students**, and schools in the Midwest have been particularly hard hit — many of them non-flagship public universities that rely heavily on tuition from foreign students.

- Nationwide, the number of new foreign students declined an average of 7% this past fall, according to preliminary figures from a survey of 500 colleges by the Institute of International Education.

CURRENT LANDSCAPE

DEMOGRAPHIC SHIFTS: REGIONAL

Demographic changes in the Northeast and parts of the Midwest continue to capture national headlines, as colleges and universities compete for ever-shrinking numbers of in-state students.

The Midwest: Strong Minority Graduate Increases But Steep Downturn of White Graduates

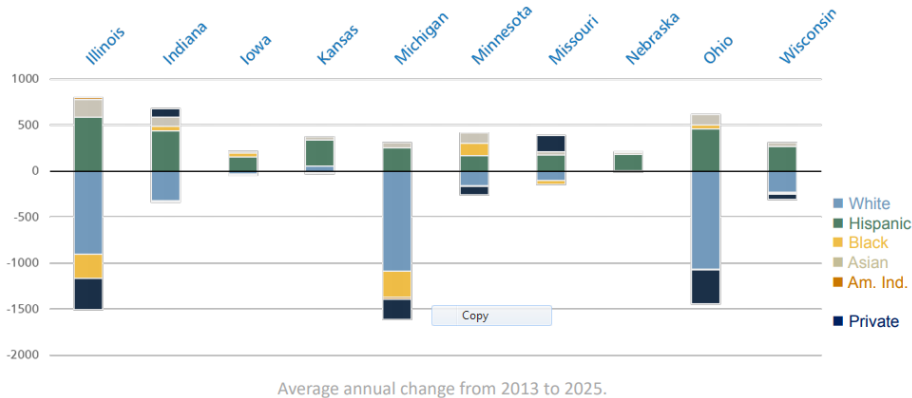
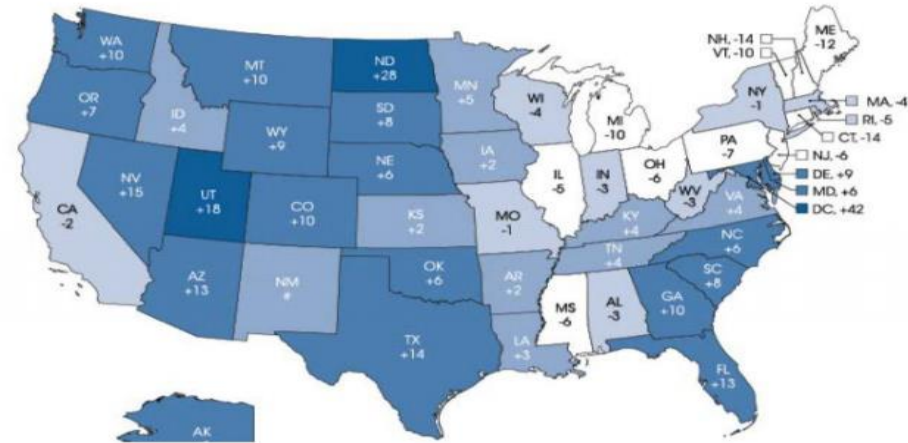


Figure 3. Projected percentage change in public elementary and secondary school enrollment, by state: Between fall 2014 and fall 2026



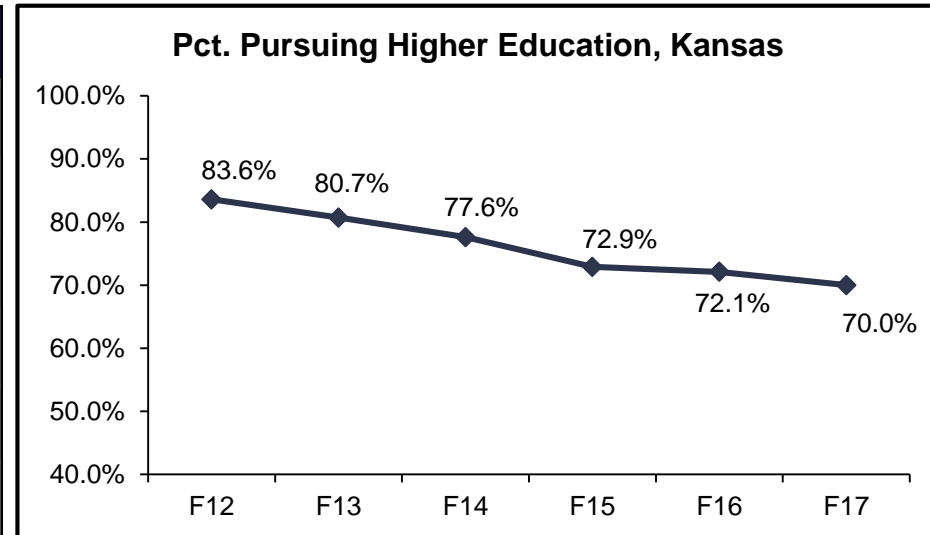
In addition to the number of students, college and universities must adapt their approach to outreach and engagement due to changes in consumer behavior as well as the differing levels of academic preparation students are bringing to campus.

CURRENT LANDSCAPE

DEMOGRAPHIC SHIFTS: KANSAS

In Kansas, while the number of high school graduates has been on the rise (4% since Fall 2012), the percentage of graduates pursuing higher education has dropped by over 13%.

Year	HS Senior Headcount, Kansas
Class of 2012	32,600
Class of 2013	32,792
Class of 2014	32,976
Class of 2015	32,709
Class of 2016	33,811
Class of 2017	33,928

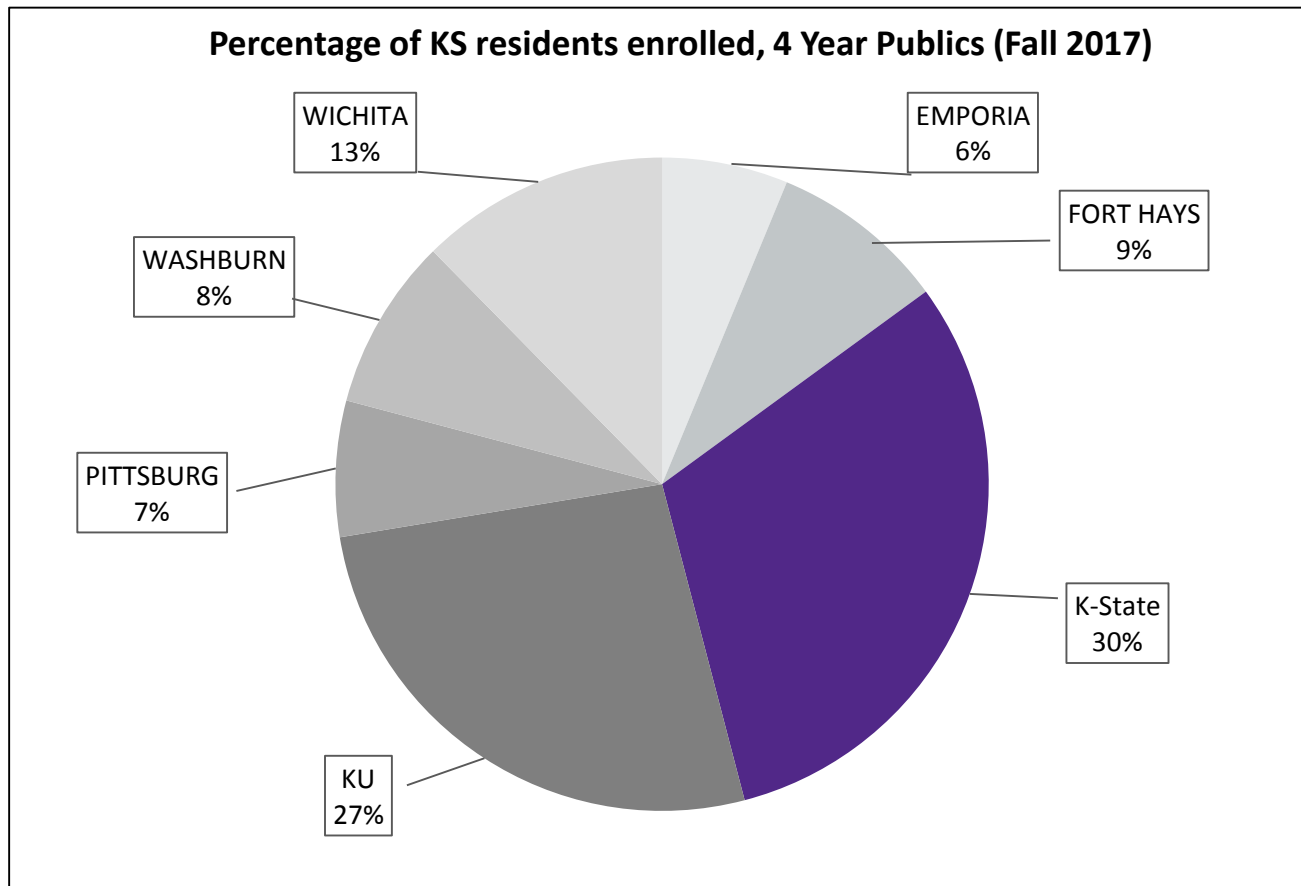


K-State is fighting a two-front war in enrollment. It must maintain its strong market share in the State against competitors, but also work with its in-state peers to strengthen higher education's value proposition to high school students.

CURRENT LANDSCAPE

KANSAS RESIDENT ENROLLMENT: FRESHMEN

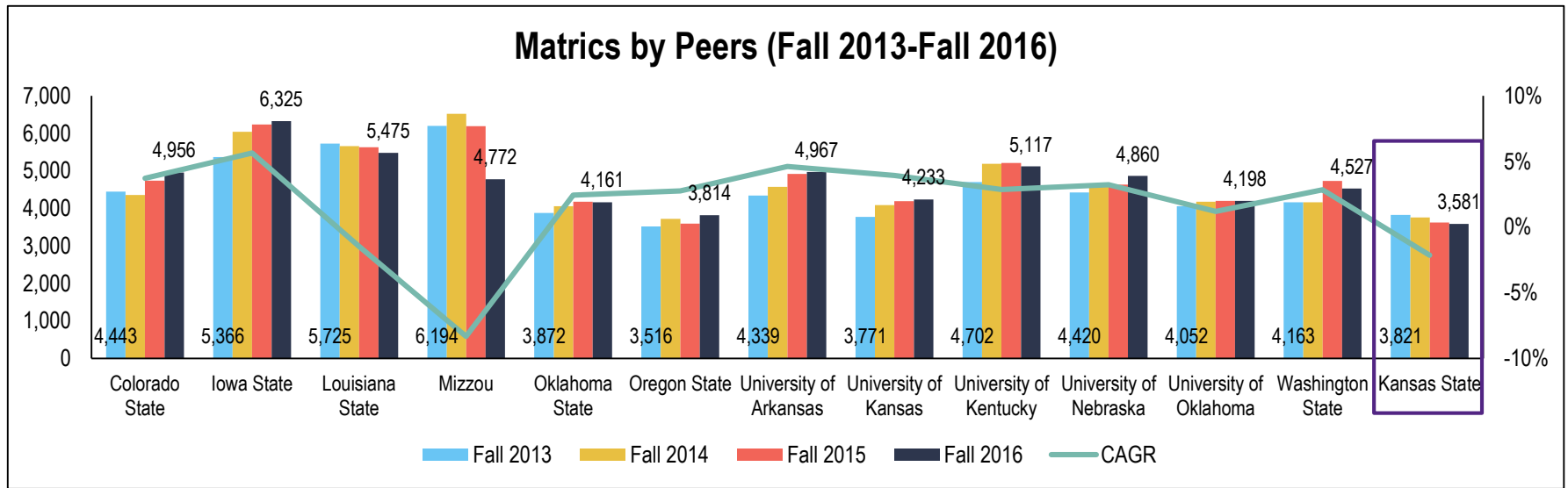
K-State consistently enrolls the highest percentage of Kansas high school graduates, among the public 4-year institutions in the State.



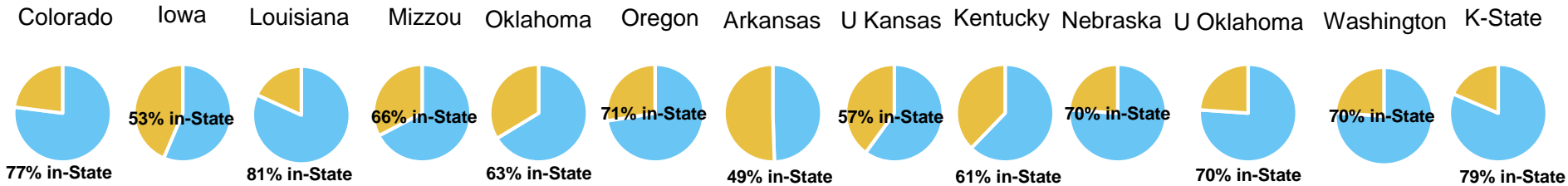
CURRENT LANDSCAPE

ENROLLMENT TRENDS: FRESHMEN

While many of K-State's enrollment peers have experienced moderate growth over the last few years, they also have higher percentages of out-of-state students.



Enrolled Students by Peer, In-State and Out-of-State (%)



CURRENT LANDSCAPE

DEMOGRAPHICS: 10 YEAR TRENDS

There is limited growth in the number of high school graduates throughout K-State's primary recruitment markets and large declines in its secondary and tertiary markets.

Projected Percentage Change in Public High School Graduates (2017-18 to 2027-28)						
	White (NH)	Hispanic	Black (NH)	Asian/Pacific Islander	American Indian/Alaska Native	Projected Change in Public HS Grads
Kansas	-2.1%	22.4%	-0.8%	18.1%	-39.7%	942
Missouri	-6.5%	22.2%	-6.3%	10.6%	-13.5%	-2809
Texas	-5.1%	0.5%	0.9%	33.6%	-7.4%	1,143
Nebraska	-2.1%	11.2%	-4.5%	31.7%	-31.9%	218
Illinois	-11.7%	-10.1%	-17.1%	15.3%	-1.0%	-15,410
Colorado	0.0%	-7.1%	-2.4%	-0.1%	-31.4%	-1936
California	-15.3%	-7.4%	-16.8%	-8.0%	-19.9%	-48,860

Forecasted growth within Kansas, Missouri, and Nebraska is driven by Hispanic and Asian students. Illinois and Texas will also see growth among Asian students.

CURRENT LANDSCAPE

COLLEGE READINESS OF H.S. GRADUATES

ACT provides information on the level of college readiness as measured by prospective college-going students taking the examination. Nearly all of the key feeder states for Kansas State University have levels of college readiness near or exceeding national averages.

College Readiness								
	Kansas	Missouri	Texas	Nebraska	Illinois	Colorado	California	National
English	69%	59%	57%	67%	66%	61%	73%	61%
Reading	54%	43%	45%	50%	48%	46%	57%	47%
Math	46%	34%	40%	42%	44%	38%	55%	41%
Science	41%	34%	35%	41%	39%	37%	46%	37%
All Four Subjects	29%	23%	26%	28%	30%	26%	38%	27%

3

PROJECT OVERVIEW

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STRATEGIC ENROLLMENT MANAGEMENT PLANNING

- + A Comprehensive Strategic Enrollment Management Plan is being developed by a steering committee of 18 members lead by Provost April Mason and Vice President for Student Life Pat Bosco.
- + The plan will be based on primary market research, an intensive analysis of undergraduate, graduate, and global student enrollment data, interviews with over 300 stakeholders across campus (students, faculty, staff, and administrators), and multiple working meetings between January and May 2018.
- + This data-driven process has helped K-State better understand the landscape and demographic forces at play, identify and solidify its place in the market, and determine ways to improve and invest in recruitment and overall student success.

PROJECT OVERVIEW

KSU STEERING COMMITTEE MEMBERS

Name	Title
April Mason *	Provost and Senior Vice President
Pat Bosco *	Vice President for Student Life and Dean of Students
Lynn Carlin ~ Δ	Special Assistant to the Provost
Ethan Erickson ~ Δ	Assistant Vice President for Budget Planning
Stephanie Bannister	Assistant Vice President for Student Life
John Buckwalter	Dean of College of Human Ecology
Grant Chapman Δ	Interim Associate Provost for International Programs
Gary Clark Δ	Senior Associate Dean, College of Engineering
Tim de Noble	Dean of College of Architecture, Planning and Design
Greg Eiselein	Director of K-State First, Professor of English, Arts and Sciences
Robert Gamez Δ	Director of Student Financial Assistance
Molly McGaughey Δ	Director of Undergraduate Admissions
Jeff Morris Δ	Vice President of Communications and Marketing
Brian Niehoff Δ	Associate Provost for Institutional Effectiveness
Karen Pedersen	Dean of K-State Global Campus
Gary Pratt	Chief Information Officer
Adrian Rodriguez	Associate Vice President for Student Life of Diversity and Multicultural Student Affairs
Carol Shanklin Δ	Dean of Graduate School

PROJECT OVERVIEW

ENROLLMENT TRENDS: KANSAS STATE

The last several years of recruitment and enrollment outcomes at K-State are reflective of the demographic and economic trends happening in the sector nationally.

Enrollment

- In October, the Kansas Board of Regents announced that Kansas State recorded the largest percentage drop in enrollment in Fall 2017 of the state's six regents universities.
 - K-State had 22,796 students this fall, a drop of 984, or 4.14%, from the previous fall. The 2017 count is the lowest total for fall enrollment the university has seen since 2002.
- K-State has seen a steady decrease of students in recent years, including Transfer and Graduate students. Over the last 3 years, K-State has lost nearly 2,000 students (~8 % decrease) since hitting an all-time high of 24,766 in 2014.
- However, scholarship and enrollment numbers at the Global Campus are experiencing general increases.
 - Over 12,000 students enrolled in online courses for fall 2017, with 4,800 being online-only students.
 - Currently, the Global Campus graduates between 500 and 550 students each year via online degree programs and facilitates education to students in all 50 states and 44 countries.

Retention and Graduation

- The Fall 2017 incoming freshman class had the second highest composite ACT score in history of 24.9, nearly equaling the previous year's record 25.0.
- Fall-to-fall retention rates for freshmen to sophomores nearly matched historical highs at 84%.
- The six-year graduation rate has increased from 58 to 63% in the past five years.

PROJECT OVERVIEW

POTENTIAL ENROLLMENT LEVERS

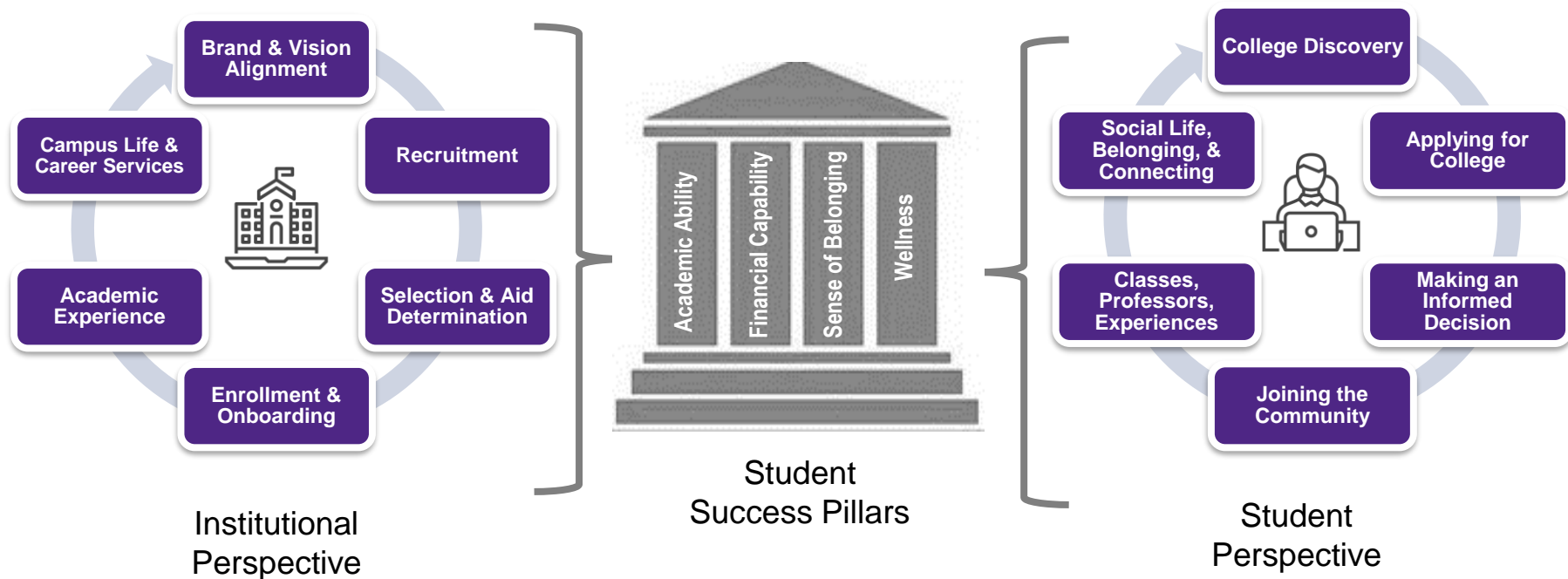
To achieve enrollment growth at the undergraduate level, K-State can explore several key levers:

Factor	Description
Increase First-Time, Full-Time (FTFT) Freshmen Enrollment	Expanding the overall enrollment of the incoming class would increase revenue.
Adjust In-State and Out-of-State Mix	Striking the optimal balance between in-state and out-of-state undergraduates may produce gains in net tuition revenue and additional geographic diversity.
Redistribute Aid	Reallocating institutional aid could increase enrollments and NTR or allow K-State to incentivize retention for at-risk student segments.
Increase Number of Transfer Students	Developing a strategy for increasing the number and share of transfer students could help to offset attrition.
Increase Number of International Students	Adapting KSU's approach to the recruitment of international students is necessary to remain competitive in a rapidly changing marketplace.
Increase Non-Traditional Enrollments	Increasing enrollments among non-traditional, non-degree completers offers the dual benefit of strengthening the KS workforce as well as increasing tuition revenues.
Increase Retention	Increasing retention remains a priority for K-State and would lead to a corresponding increase in revenue.

PROJECT OVERVIEW

STUDENT LIFECYCLE FRAMEWORK

Utilizing an **integrated framework**, we have focused on **K-State's institutional strategy** and **student experience** (mission, vision, and identity) and the **organizational and operational components** (business processes and financial considerations) to create **measurable successes** necessary to achieve K-State's enrollment goals.



PROJECT OVERVIEW

FOUR PILLARS



The following factors constitute the 4 Pillars of Student Success:

Academic Ability, Financial Capability, Sense of Belonging, and Wellness

Our partnership with K-State allows us to examine the Undergraduate experience and explore the institution's commitment to *Engage in a concentrated, purposeful effort to **build an integrated, university community at all levels to encourage student success, faculty mentorship, cross-campus and interdisciplinary collaboration, and social interaction.***

2025's strategic planning principles lay the groundwork for developing a comprehensive student success strategy. As we examined K-State's enrollment trends we used the Four Pillars of Student Success to guide our analysis and ensuing recommendations.

- **Academic Ability**
 - *Variables include HS GPA, ACT, K-State Credits Attempted & Earned, K-State GPA*
- **Financial Capability**
 - *Variables include Expected Family Contribution, financial need, merit- and need-based awards*
- **Sense of Belonging and Wellness**
 - *Variables include demographic factors (residency, ethnicity, gender, dorm status, first-gen, etc.), in addition to K-State specific experiences (Wildcat Warm-Up, K-State First, Greek Life, Athletics)*

5

NEXT STEPS

PROJECT NEXT STEPS

Strategic Enrollment Management Plan Development

- + Collaborate with the University's leadership to develop a Strategic Enrollment Management Plan with a range of approaches to reach K-State's goals for student enrollment.
 - The plan will include specific goals and metrics, and will be focused on those activities that have the highest likelihood of impacting the outcomes of recruiting and enrolling K-State students.
 - We will also work with the University to develop an understanding of the likely investments that may be required to build an effective roadmap for achieving the target enrollment composition.
 - It is crucial that the recommendations and plan are consistent with K-State's culture and values so they can be successfully implemented.

Ongoing Activities

- + Prepare organizational structure recommendations to align roles and responsibilities to enhance communication and coordination of enrollment management activities throughout the University.
- + Develop a financial aid strategy for K-State's undergraduate students that leverages institutional scholarships awarded in a coordinated pursuit of shared enrollment objectives among colleges and the institution as a whole.
- + Provide K-State with ongoing advisory support and meeting facilitation for the socialization of the Strategic Enrollment Management plan.

CALL TO ACTION

Maintaining In-State Dominance

- + Kansans are more likely to be cost-conscious and less likely to see value in a traditional 4-yr degree. A strong value proposition is necessary for K-State to remain the #1 choice.
- + Increasing the number and amounts of need-based awards will facilitate the enrollment and persistence of low-income and first-generation students from Kansas and neighboring states.

Expanding K-State's Reach

- + Cultivating recruitment markets beyond Kansas will require awareness building investments over the long-term that reflect the multi-year prospect development timeline for traditional age students.
- + K-State must move beyond a one-size-fits-all outreach strategy and develop an engagement strategy that addresses the diverse needs of an increasingly sophisticated audience.

Strengthening the K-State Experience

- + K-State will need to effectively support the students it currently serves prior to any renewed growth to avoid exacerbating current retention issues that could harm K-State's brand.
- + Enhancing experiential learning opportunities are essential to demonstrating the value of the K-State experience and differentiating the educational experience in Manhattan.



THANK YOU

