Budget Planning Council Meeting Agenda
September 28, 2017 • 11:00am – 1:00 pm
Baker Center ~ Room 503

Meeting Objectives

- Provide members with an update on Ohio University’s Fall 2017 Enrollments
- Discuss OU’s enrollment trends in the context of Strategic Enrollment Planning, scholarship leveraging decisions and long term budget planning assumptions

1. Enrollment Update, Fall 2017 (Craig Cornell)

2. Future Meetings:
   October 12, 2017: Baker Center ~ Room 503
Strategic Enrollment Management Update – Fall Census

Budget Planning Council
Ohio University’s Multi-Modal Educational Strategy has Driven Enrollment Success
Freshman and Other New Student Enrollments

Athens Campus

New Freshmen Students
- 4,045
- -264 (-6.1%) over last year
- 5th year in a row over 4,000 students

New Transfer Students
- 461
- -84 (-15%) over last

College Credit Plus, Athens
- 60 new Athens students – tentative
- -28 students
- 32% decrease over last year at the Athens Campuses
- 859 prelim. total enrollments (all campuses), -74 (7.9%) students over last year (not included in freshman numbers)
New Freshman Highlights

Multi-Cultural Student Enrollment as a Percent of Freshman Class
535, 13.2% of Freshman Class

Out-of-State Enrollments in Freshman Class
516, 12.8% of Freshman Class

International Enrollments in Freshman Class
28, 0.7% of Freshman Class

Freshman Student Quality

**RECORD** (tied)- Average Composite ACT of 24.1

**RECORD** Average High School GPA of 3.54

18.3% in top 10% of their high school class- highest in 15 years

46.2% in top 25% of their high school class- highest in 13 years

*2012 – used prior year data due to Psoft conversion issues in count*
Undergraduate eLearning Enrollments

Undergraduate Degree Completion eLearning
- 5,476 students so far
- -193 (-3.4%) over last year
- Will pick up several hundred more with second and third fall term starts – anticipate approximately 5,800 students for final Fall term data
- 8 online undergraduate degree completion programs currently being fully marketed now – grew approximately 90 students

Graduate Online and Outreach
- RECORD - 2,750 Students
- Up 126 (4.8%) over last year
Graduate and Medical Enrollments

Graduate- Ground-Based (Athens + Dublin)

- 2,695 Students
- Up 9 (0.3%) over last year
- -20 Athens, +29 Dublin

Heritage College of Osteopathic Medicine

- RECORD - 922 Students
- Up 117 (14.5%) over last year
- Up 107% since 2008
- Grew from one to three campuses in 2015 with Dublin and Cleveland
Regional Higher Education – Unduplicated Headcount

- 6,570
- -394, decrease over last year
- -5.7% decrease over last year
- However, a smaller decrease in FTE at -238.7; although less students, larger credit hours taken

- Includes 741 (prelim.) College Credit Plus (CC+) students
- Skews actual headcount as each CC+ student only takes one to two classes per term; this number is down approximately 60 from last year
Currently at 35,877 unduplicated headcount for fall term

Down 533, (-1.5%) over last year’s 10<sup>th</sup> consecutive year in a row of record number of enrollments at census
Enrollment Growth - National

32 ★ THE CHRONICLE OF HIGHER EDUCATION

STUDENTS

Fastest-Growing Colleges, 2005-15

The largest growth outside the for-profit sector occurred at two private nonprofit master’s institutions that offered classes entirely or largely online: Western Governors University and Southern New Hampshire University. The third-largest increase in enrollment among public and private nonprofit institutions from 2005 to 2015 was at the University of California at Merced, which has grown more than sevenfold since its first class of undergraduate students arrived on the campus in 2005.

19th this year!

13th last year and 18th the year before
Student Indebtedness
Student Indebtedness
Graduating Class of 2016

Average Class Indebtedness of Graduating Publics in Ohio

<table>
<thead>
<tr>
<th>Institution</th>
<th>Average Debt</th>
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</thead>
<tbody>
<tr>
<td>KSU</td>
<td>$33,234</td>
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<tr>
<td>UA</td>
<td>$32,372</td>
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<tr>
<td>YSU</td>
<td>$32,133</td>
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<tr>
<td>BGSU</td>
<td>$30,801</td>
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<tr>
<td>Shawnee</td>
<td>$30,554</td>
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<tr>
<td>Wright State</td>
<td>$30,061</td>
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<tr>
<td>Miami</td>
<td>$30,015</td>
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<tr>
<td>UC</td>
<td>$28,970</td>
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<tr>
<td>OSU</td>
<td>$27,930</td>
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<tr>
<td>OU</td>
<td>$27,879</td>
</tr>
<tr>
<td>CSU</td>
<td>$25,504</td>
</tr>
<tr>
<td>UT</td>
<td>$24,437</td>
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</tbody>
</table>

Ohio Publics Average $30,351
Ranked 9th highest in nation

Source: Institute for College Access and Success: Project on Student Debt (https://ticas.org/posd/map-state-data#)
Student Indebtedness
Graduating Class of 2016

Proportion of Graduates with Any Debt

Ohio Publics
Average 64%

Source: Institute for College Access and Success: Project on Student Debt (https://ticas.org/posd/map-state-data#)
Strategic Positioning
Strategic Positioning

Specific Efforts - Freshmen

• Student Engagement—
  • Re-targeting name buys to specifically address enrollment patterns from this year
  • Enhancing outreach to 12% more rising seniors who have already “raised their hand”

• Multi-Channel Enhancement to Overall Student Outreach/Marketing
  • Adding in digital campaigns and retargeting
  • Developing specific marketing messages to select populations/geographies/majors, etc.
  • New RFP for media buyer with UCM

• International Strategy
  • Implementing now with 2 new staff in China
Strategic Positioning
Specific Efforts – Transfer Students

• Transfer is both to Athens and Online Degree Completion
• OHIO for Ohio Conversations with CSCC
• Incorporating Dr. Nellis and the Office of the President when most beneficial
• Enhancement to STEP at all Partner Institutions (Strategic Transfer Education Plan)
• OHIO Guarantee for STEP students
• 5 Community Partnerships Managers regularly on our 20 community college partner campuses multiple times a week
• Receive approximately 300 relocate students each fall term from RHE
• Currently live with our first fully integrated online digital marketing campaigns for undergraduate degree completion and graduate programs
Strategic Positioning

Specific Efforts – Regular Enrollment Planning Efforts

• Hold regular meetings through late summer/early fall with all Deans and representatives to discuss enrollment planning efforts
  • Focus on enrollment metrics, capacities, annual planning, marketing, etc.
  • Refine enrollment plans and goals
  • Plan for upcoming program launches

• Meet regular with Deans as a group to discuss strategic initiatives:
  • Bi-Monthly meetings as part of Academic Leadership
  • SEMP in August
  • Scholarship leveraging model analysis conversations (twice in September)
  • Other strategic initiatives, accountability on approved initiatives, etc.
Budget Planning, Enrollment Projections and the SEMP
# Enrollment and BPC Projections

## Considerations

1. **BPC Enrollment Projections vs. SEMP Goals**

<table>
<thead>
<tr>
<th>Strategic Enrollment Management Budget Projections: Fall 2017 for BPC Discussion</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Based on High School Graduates and Proportional Market Share for New Freshman Classes, Fall Terms</em></td>
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<tr>
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<tr>
<td><strong>Ohio High School Graduates</strong></td>
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<tr>
<td><strong>Graduates Attending College or University</strong></td>
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<td><strong>Graduates Attending University</strong></td>
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<td><strong>OU Share of Graduates attending University</strong></td>
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<tr>
<td><strong>Out-of-State</strong></td>
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*Projected based on current enrollment statistics 8/16/17*  
**Projected based on high school graduates attending public colleges and OHIOs proportional share of that population equal to OU’s estimated share in Fall 2017.
# Enrollment and BPC Projections

## Considerations

1. **BPC Enrollment Projections vs. SEMP Goals**

### Freshman Cohort for Budget Planning

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</thead>
<tbody>
<tr>
<td>In-State</td>
<td>3,756</td>
<td>3,774</td>
<td>3,529</td>
<td>3,574</td>
<td>3,449</td>
<td>3,366</td>
<td>3,346</td>
<td>3,311</td>
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<tr>
<td>Out-of-State</td>
<td>667</td>
<td>535</td>
<td>516</td>
<td>535</td>
<td>535</td>
<td>535</td>
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<td>535</td>
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<tr>
<td>Total- BBC Planning</td>
<td>4,423</td>
<td>4,309</td>
<td>4,045</td>
<td>4,109</td>
<td>3,984</td>
<td>3,901</td>
<td>3,881</td>
<td>3,846</td>
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### SEMP Goals

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</thead>
<tbody>
<tr>
<td>In-State</td>
<td>-</td>
<td>-</td>
<td>3,529</td>
<td>3,550</td>
<td>3,560</td>
<td>3,570</td>
<td>3,580</td>
</tr>
<tr>
<td>Out-of-State</td>
<td>-</td>
<td>-</td>
<td>516</td>
<td>580</td>
<td>590</td>
<td>600</td>
<td>610</td>
</tr>
<tr>
<td>Total- SEMP Goals</td>
<td>-</td>
<td>-</td>
<td>4,045</td>
<td>4,130</td>
<td>4,150</td>
<td>4,170</td>
<td>4,190</td>
</tr>
</tbody>
</table>

| DIFFERENCE- BPC vs. SEMP | - | - | - | 146 | 249 | 289 | 344 |
Enrollment and BPC Projections

Considerations

1. BPC Enrollment Projections vs. SEMP Goals
2. Developing Scholarship Analysis
   - Annual process to determine our competitive position and where we stand
   - Running a series of models for consideration with academic leadership
   - If decided, will have budget implications due to potentially rebalance or enhanced scholarship costs against growing enrollments and net tuition revenue
3. Timeline:
   - Scholarship Leveraging
     - Analyzing usage and projections for incoming class- done in October
     - Multiple presentations done in August, September with Academic Leadership
     - Feedback from Deans being gathered
     - Further discussions next week
     - Need final decision by November 1st so we can code awards by December 1st when we will then notify admitted students of their merit scholarship award
   - Will input Spring Enrollment Projections, Scholarship Leveraging Model Decisions and Enrollment Projections into Overall Budget Planning Assumptions to determine overall impact moving forward
Enrollment and BPC Projections

<table>
<thead>
<tr>
<th></th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19</th>
<th>FY20</th>
<th>FY21</th>
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<tbody>
<tr>
<td>Guarantee Tuition Rate Growth</td>
<td>3.5%</td>
<td>3.5%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>5.1%</td>
<td>1.7%</td>
<td>1.3%</td>
<td>1.3%</td>
<td>3.3%</td>
<td>3.3%</td>
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<tr>
<td>Non-Guarantee Tuition Rate Growth</td>
<td>3.5%</td>
<td>3.5%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>2.0%</td>
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<tr>
<td>Discount Rate</td>
<td>18.6%</td>
<td>18.5%</td>
<td>20.6%</td>
<td>20.5%</td>
<td>22.4%</td>
<td>24.0%</td>
<td>25.6%</td>
<td>26.4%</td>
<td>26.7%</td>
<td>26.6%</td>
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<tr>
<td>Total Headcount (Fall)</td>
<td>17,302</td>
<td>17,007</td>
<td>17,375</td>
<td>17,660</td>
<td>17,965</td>
<td>18,197</td>
<td>18,002</td>
<td>17,845</td>
<td>17,618</td>
<td>17,424</td>
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<tr>
<td>New Freshmen (Fall)</td>
<td>3,883</td>
<td>3,888</td>
<td>4,244</td>
<td>4,377</td>
<td>4,423</td>
<td>4,309</td>
<td>4,109</td>
<td>4,109</td>
<td>4,109</td>
<td>4,109</td>
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<tr>
<td>Gross Tuition</td>
<td>$189.9</td>
<td>$207.2</td>
<td>$213.3</td>
<td>$222.0</td>
<td>$229.3</td>
<td>$232.7</td>
<td>$231.8</td>
<td>$234.9</td>
<td>$236.0</td>
<td>$238.6</td>
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<td>Financial Aid</td>
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<td>$43.9</td>
<td>$45.5</td>
<td>$51.3</td>
<td>$55.8</td>
<td>$59.4</td>
<td>$61.9</td>
<td>$63.0</td>
<td>$63.4</td>
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<td>Net Tuition</td>
<td>$154.6</td>
<td>$168.8</td>
<td>$169.4</td>
<td>$176.4</td>
<td>$178.0</td>
<td>$176.9</td>
<td>$172.4</td>
<td>$173.0</td>
<td>$173.0</td>
<td>$175.2</td>
</tr>
</tbody>
</table>
BPC Members In Attendance: David Descutner, Trevor Roycroft, Joe McLaughlin, David Thomas, Matthew Shaftel, Maria Modayil, Jason Pina, Cindy Anderson

BPC Members Absent: Deb Shaffer, Brooke Mauro, Jessica Wingett, Heather Gould, Reneé Middleton, Faith Voinovich, Randy Leite, Susan Williams, Landen Lama

Staff: John Day, Chad Mitchell, Heather Krugman, Katie Hensel, Dawn Weiser, Jim Sabin, Rosanna Howard, Kayla, Righter, Bob Kissell, Brooke Miller, Shelley Ruff, Craig Cornell, Jen Kirksey, Laura Myers

Strategic Enrollment Management Update – Fall Census – Craig Cornell

Fall Enrollment Census
- Enrollment discussions encompass more than just freshmen and undergraduate numbers – transfers, graduate, eLearning, Dublin, etc. are part of the enrollment projections
  - Total enrollments of 35,877 unduplicated headcount across all modalities; this will be our first year down following 10 consecutive years of growth
  - OHIO has been ranked the 19th fastest growing college for 2005-2015 by the Chronicle; OHIO has ranked between 13-19th over past several years
- Freshmen
  - Fall 2017 enrollments down 264 / 6.1% over last year; 5th year in a row over 4,000 students
  - Down in College Credit Plus (CC+) this Fall; Craig noted that smaller institutions are starting to offer this option for free – we already lose money on CC+ so we have not considered free tuition for CC+
  - Multi-cultural, resident and international enrollments contributed to the Fall 2017 drop
  - Student quality statistics, ACT and HS GPA, percentage of students in top of their high school class all improved with the 2017 cohort and are at an all time record
- Transfer
  - We are implementing Community College completion agreements and expect this to continue to increase transfer students, whether on campus or on-line, in the future
- Undergraduate eLearning
  - Showing flat but more enrollments will be realized with 2 additional Fall start dates for some programs – anticipating ~5,800 students
  - Continue to grow available online programs for undergrads – degree completion and certificates
- Graduate Online also growing at a great rate – 7.6% over prior year
- Graduate and Medical both growing – Dublin and HCOM expansion campuses account for growth
  - Medical enrollments at 922; close to the max of 940 medical students
- RHE has challenges that are similar to other public regional campus systems
  - Headcounts are disproportionately impacted by CC+ students; CC+ students take fewer classes at significantly discounted rates
  - 6,570 total RHE headcount represents a 394 loss in enrollments; includes 741 CC+
    - Losses occurred at 3 of the 5 regional campuses
    - Impacted campuses vary and enrollments fluctuate depending on the economy

Student Indebtedness
- OHIO ranks well compared to IUC peers regarding student debt upon graduation; ranked 3rd lowest of 12 schools
- 67% of our students borrow and they average $27K in debt upon graduation; Craig will supply the median
Craig cautioned about comparing against OSU when it comes to student indebtedness and Pell Grant statistics recently released.

- *How does EFC drive indebtedness ... can correlation be drawn for OHIO students?* Craig will report back based on review of Enrollment analytics.
- *OHIO % of students on Pell Grants vs OSU?* Craig will provided stats
- Craig reminded that OHIO is still playing catch-up when it comes to the amount of budget set-aside for aid by our IUC peers as shown in several recent reports.

**Strategic Positioning**

- Information from student surveys is being compiled now by IR
- Enrollment Management is retargeting students from specific populations if application activity isn’t as expected from first attempt to attract them to OHIO
- 2nd year of Common Application
  - will allow us to hone in on more likely success activity based on last year’s experience
  - Craig discussed a plan to reinstitute partial fee waivers earlier in the process as a way to positively impact yield
- At this point in Enrollment planning Craig is:
  - finalizing appointments with Deans to discuss Fall 2017 results, take the opportunity to refine goals based on capacity, and discuss marketing tactics
  - discussing strategies involving scholarship leveraging, SEMP, etc. at the Academic Leadership meetings

**Enrollments and BPC Projections**

- *Freshman class assumptions* – Enrollment Management and Budget Office have worked together to develop an analytical methodology for projecting new freshmen
  - Methodology starts with projected Ohio High School (HS) graduates
  - Calculations using 2010 – 2016 actuals compared OHIO market share of Ohio HS graduates year-over-year
    - Could use resulting average ‘market share’ of ~10% and estimated HS graduates as basis for projecting future enrollments
    - Reasonable approach; new scholarship initiatives must be factored into enrollment trending once they are adopted
  - Methodology creates a conservative budget estimate / enrollment ‘floor’ for which BPC then will consider how Enrollment Management / Admissions efforts impact our market share
  - *How do academic quality goals factor into a strictly numeric ‘goal’?*
    - Balancing between maintaining enrollments and quality is how we currently operate
    - Admissions folks screen for admittance, ‘batches’ of applicants are then analyzed for quality before being formally admitted
    - *Core 24 – 28 ACT -> how do we treat and keep this group?* Need to ensure OHIO isn’t losing more to competitors

- *Scholarship Analysis*
  - Analyzing competitive position
  - Working toward scholarship leveraging recommendations in October with final decision from leadership by November 1 allowing time for aid plans to be coded for December
  - Growing net tuition is the desired result
- *Multi-year assumptions* for gross tuition, scholarship and resulting net tuition all factor in growth projections for budget planning
  - Many variables are involved and drive the net result -> tuition increases, scholarships / tuition discounting, enrollment planning, program and housing capacity
BPC future discussions will focus on a budget baseline driven by class size, tuition rates, and scholarship investments
  - Tuition assumptions - will state allow a 2% increase tuition cap -> results in 2% plus 5 yr avg CPI for Guarantee cohort
  - Discount rate represents the percentage amount of scholarship to tuition

Spring Enrollment Planning – the proposal as presented is to incorporate
  - Initial planning assumption using Ohio HS graduate projections to budget freshman cohort(s)
  - SEMP goals will be higher
  - Scholarship leveraging recommendations and decisions
  - Adjust enrollment planning assumption in late Fall, early Spring in conjunction with scholarship plan and information from Admissions efforts

Next steps
  - Discussions with Deans – currently running through 20+ models for scholarship with final recommendations to be presented to the President, Deb, and David
  - Range of new aid investment
    - Doing nothing may result in our losing enrollments
    - Craig analyzing our need-based money and when and how best to use it to entice students to OHIO – earlier offerings keep OHIO in the mix as families consider school and cost options
    - Modeling the net tuition impact of varying investment options
      - Never look at negative net tuition options
      - Many scholarship investments have a 4 year life
      - OHIO still catching up from lack of investment in scholarship in the 90’s and 00’s
  - BPC will need to discuss at Oct 12 or 26 meeting in order to meet the November and December timing for decisions
  - Implications of scholarship decisions and multi-year budget impact to be calculated and incorporated into the Spring budget planning assumptions
  - Building an enrollment / tuition budget floor considering campus capacity, program capacities, housing

Next Meeting – Thursday, October 12, 2017, 11:00-1:00, Baker Rm 503