



Enrollment Management Committee
April 22, 2022
8:00 a.m. | Science Center Lyceum

Call to Order and Opening Prayer Mr. Lamont Woods, Committee Chair
Introductions/Opening Remarks Mr. Woods
Approval of Minutes from October 22, 2021 Mr. Woods
Enrollment Summary Dr. Joshua Arnold, VP of Admissions and Student Development
Strategic InitiativesAdministrative Staff
 Traditional Admissions..... Dr. Joshua Arnold and Ms. Sherelle Morgan
 Online Admissions..... Ms. Sherelle Morgan, Director of Online Admissions
 Financial Aid Ms. Cary Wright, Director of Financial Aid
 Retention Mr. Alan Smith, Senior Director of Student Thriving and Success
Student Remarks Ms. Emma Justus, SGA Representative
Faculty Remarks Dr. Emily Lambert, Dean, College of Sciences & Health Sciences
General Discussion Committee
Closing Remarks/ Prayer.....Lamont Woods

Enrollment Management

Mr. Lamont Woods, Chair
Mrs. Terri N. Cole
Mr. David T. Larimer, II
Rev. Craig F. Stout
Dr. Dixie Tooke-Rawlins
Mr. Michael Wade

Mr. William S. Winfrey II
Dr. Joshua Arnold VPASD, ex officio
Mrs. Ruth Blankenship, VPFA, ex officio
Ms. Emma Justus, SGA Rep.
Dr. Emily Lambert, Dean

Enrollment Management Meeting Minutes
Fall BOT 2021
Submitted by: Emily Coppola

Chair: Lamont Woods

Attendees: John Beckett, Terri Cole, Allen Jessee, Craig Stout, Mike Wade, Bill Winfrey, Roger Ott, Ruth Blankenship, Josh Arnold, Sherelle Morgan, Scott Polhamus, Alisha Maloyed, Alan Smith, Emily Lambert, Cary Wright, Emily Coppola, and Carrie-Ann Moss, SGA.

Committee Chair Lamont Woods welcomed everyone to the Fall BOT Enrollment Committee meeting and opened the meeting in prayer. Lamont asked the BOT members if they had reviewed the minutes from Spring 2021. With no questions or changes, Lamont called for a vote.

**Motion moved to approve last minutes
Craig Stout motioned, Seconded by John Beckett
Minutes approved.**

Enrollment Overview:

Dr. Josh Arnold, VP for Admissions and Student Development, shared a brief overview of his enrollment summary provided in his report. He shared that enrollment numbers were down from prior years and the strategy of retargeting counselors focus on recruitment. Enrollment counselors will be targeting high quality students, the homeschool sector, and locals by pushing our Pathways Program.

Ruth Blankenship, VP of Finance and Administration, shared with trustees that Financial Aid has been moved under her leadership with the realignment. She has been working with Cary Wright, Director of Financial Aid, Josh Arnold, and Roger Ott as FA is a huge part in the recruiting and enrollment process. BU has seen a hit with finances due to the discount rate. Ruth also shared from her report that she is working closely with our Data Intelligence Director, Josh Grubb, who can track in real time the enrollment process for each student, which gives her a better look at discount rates.

Cary Wright, Director of Financial Aid, shared briefly from her report and is hopeful the new retargeting and high tracking of discount rates will assist in not losing as much money.

Roger Ott has been working very closely with Ruth and the enrollment teams and shared his projections on what's to come for enrollment and a change in numbers.

Traditional Admissions:

Scott Polhamus, Associate Director of Traditional Admissions, discussed the difficulties that the admissions office has faced in the past cycle. Scott shared data on how much return on investment per resource was given, showing that college fairs gave the lowest return. The highest return was referrals. The retargeting of counselors with set schools and goals, shows how the recruiting change is seeking better results than prior years. Among these goals is to also remarket the Pathways Program for local students. Scott shared the Pathways initiative with the committee. Scott also emphasized the importance of marketing campus culture. This emphasizing of culture, partnered with recruiting students that follow suit in this culture and belief system, will bring in new enrollment. The previously frozen admissions counselor position is now open for recruitment. The partnership with Roger Ott is also working to restructure the enrollment process from start to finish.

The trustees and enrollment team members discussed the Pathways Program further and its benefits to the university.

Online Admissions:

Sherelle Morgan, Director of Online Admissions, shared her report with the trustees. She spoke about working with Roger and his consultant team for the last 10 months. Overall, the online strategy is to overhaul the entire online operation. These changes have brought tech updates, policy changes, staffing, and onboarding training. Though, there are 12-13 pages in the operations plan, there are roughly 101 tasks to complete.

Goals completed to date:

- new tech launched in 3 major areas
 - new CRM
 - new learning management system (CANVAS)
 - new software system, Cloud Call
- Onboarded a new digital marketing partner, Cloud Control Media.
- Expansion of the online team
- Hired remote counselors
- Online has grown by 5 new team members from September to October

Online is still needing more team members to work the expected number of new students projected with the new operations plan. Training of onboarding is now housed in canvas in a self-paced course. They are experiencing similar process as students in this training. Keeping this info in Canvas allows constant refreshment and updating which ensures that training is as up to date as possible. Online enrollment is experiencing a drop by 41%. 23 students enrolled for August term. This could be a residual effect of the pandemic or the implementation of a new marketing partner.

A few challenges that might have caused this drop in numbers is:

- Salesforce didn't launch on schedule
- The fall leads were not uploaded on schedule
- Staffing was not as strong (of the 2 counselors only 1 was hired in a time to impact the fall term)

Graduate enrollment outperformed undergraduate enrollment for the fall. There was a graduate decrease, but it still outperformed undergraduate. MABS program enrolled 101 students (seated). This is the first time in 4 years it has not met goal of 125. MABS began online this year and enrolled 14 students. The next several months, Salesforce integration will continue which will help the admission process. Evaluation metrics, KPI, will continue to grow as well. Sherelle mentioned that she hopes to continue to onboard more counselors to help with workload. She would also like to implement a quality assurance and coaching process to ensure that these counselors can provide quality service.

Trustees questioned the online enrollment funnel numbers and its growth in recent months. Sherelle shared that marketing strategies have helped increase the funnel within the last month.

Financial Aid:

Cary Wright, Director of Financial Aid, shared with the committee that BU is no longer working with RNL for in house tracking and reiterated Ruth's comment about checking discount rates in live time through our new intelligence data. Cary shared that there has been an increase in communication with admissions and athletics which seems to be helpful. FA has seen several offices transition this past year. Training is a high priority for Cary and her team; they are

working with admissions on more FA training for counselors. Cary shared her initiatives for financial literacy and also spoke about deferment and how this helps the discount rate because there are no repayments. Once students begin repayment, there is a fear that these students will go into default because they don't quite understand the language and process. Cary has submitted the documentation needed for recertification and is currently on a month-to-month participation agreement. Awarding for 2022-23 is expected to start on Nov 1.

Retention/Student Success

Alan Smith, Director of Student Success, shared his report to the enrollment committee. He highlighted that with the realignment, retention is now handled through academic affairs (his office moved to AA but job the same). In 2020, there was a 66% retention rate. Last fall, when the board report was supposed to be submitted the retention report was pulled before the no-show students were removed. This should be corrected within the next month or two to show a 57% retention report. Fall sport pushed to spring competitions allowed for students to connect prior to their sport start. Football traditionally has the lowest retention rate, but the move to spring showed higher retention rates last spring. This incoming class is having fewer academic struggles (and those that retained from last year) as shown through early alerts system. Difficulty with online teaching through pandemic has posed difficulties, but through CANVAS the reports can be pulled by current staff to seek out faculty prior to an early alert needing to be submitted. Live grades will be able to be viewed by staff to be tracked as a tool to access a student's progress. Last year, the student success committee worked in 3 committees to create a full retention plan. Prevention committee, led by Cary Wright and Paul Lemon, mapped out a full retention plan that gave preventative measures for students to support them through the entire process. The student success committee has changed the focus from reactively working with students to proactively working with students. Josh Grubb, Director of Data Intelligence, will be working with Alan to share data reports on students who we may not retain. This will give Alan and the SSC a chance to connect with them and try and register them for Spring 2022 or learn why they withdrew.

Student Representative:

Committee Chair Lamont Woods welcomed SGA Representative, Carrie-Ann Moss. Carrie-Ann shared with the committee that SGA has been working to grow group members. They started the semester with 3 students and now have 20 involved. SGA is now holding office hours Monday-Thursday from 7 pm-8 pm in the student center to be more available for students to ask questions or share concerns. SGA will be hosting tailgates and fund raisers to raise more money for the program. SGA sent out a survey for student opinions. Results should be in soon to share with the CLT. At current, 3.9 stars have been given to facilities/dining (lowest rating given). Carrie-Ann shared how activities on campus and student engagement is growing. Carrie-Ann also spoke on social media and how videography assists with enrollment and retention because it makes the university attractive. Watching these on Instagram is fun for current and prospective students.

Trustees asked Carrie-Ann if their office hours have helped. Carrie-Ann replied that it is still relatively new for both SGA and student population but has been effective. Students are still emailing in issues, but they look for more to attend the office hours as they continue throughout the year. Trustees also inquired about the student survey and rating concerns. Carrie-Ann reiterated that facilities and dining is the lowest as of yet, which is to be expected; but once they have the final results, it will be shared with students and CLT members.

Committee Chair Woods was curious about students navigating covid on campus again this year. Carrie-Ann responded with mainly student support and continued COVID precautions.

Committee Chair Woods asked if students have been educated on Vaccines. Both, Carrie-Ann and Dr. Arnold explained that Student Development staff members have been sending communications to campus. Dr. Arnold shared the different pushes through summer and that vaccine clinics have been hosted on campus before students left and when they returned. Student Development also did individual team meetings with campus nursing and sports medicine departments to push us to 60%.

Faculty Representative:

Dr. Emily Lambert shared with the committee that faculty are pushing for retention improvement. Departments have held open houses for exploratory students (previously undecided students) to help choose a major. Faculty members are set to hold Academic convocation to meet with freshmen and transfers since this will be the time they do that at BU. This allows for them to understand which courses to register for and how to navigate the registration process. Registration services now has provided print material to navigate registration process (as well as a video to assist). Advisees are being tracked afterward to see if they enrolled in the courses suggested. Faculty are also pushing to watch which students enroll prior to Spring and if a student has not registered, so they can be reached out to by faculty. Faculty have also been working with student development team members on the Moving the Needle Project where many subcommittees are led by faculty members. Ideally, students are wanting face to face classes, but there are some students who still need to be virtual. Dr. Lambert highlighted how faculty are continuing to record lectures or live stream if students can't attend class. MABS (Master of Biomedical Sciences) expanded and though numbers are down, but students have retained due to the online option. Dr. Lambert shared that BU is looking to start bringing in MABS students from last three years who didn't graduate due to low grades in one or more classes. BU will readmit those students to repeat those classes and earn their degree. Dr. Lambert shared that MABS will also look at recruiting students who fell short at other medical programs from various schools and move their credits to BU. CRJ is also doing the same and retaining students with the online option.

Trustees asked Dr. Lambert more about the MABS program and how the online seating works different from face to face. Dr. Lambert shared that now students can go back and retake a course online when they are in a face-to-face model. So, if a student missed a graduation requirement for one course, they would not get a degree; but now, we can allow them to retake the course through online and still earn a degree from BU. This was part of the rationale in moving the program online.

Trustees and Dr. Lambert spoke more about faculty recording lectures so students can refer back to those after the live class was presented.

Committee Chair Woods opened the floor for questions:

- Trustees asked for more context related to the discount rate. Ruth shared that in the past, those with low GPA were given a higher aid package. They can, and do appeal three or more times. They can be with us for several semesters with poor grades if appeal with high packages. Ruth also shared that Bluefield is tracking more and changing the entire awarding system with the new CRM and technology in place from our IST teams.
- Discussion amongst the group occurred about retention numbers related to discount rate. Cary and Ruth both spoke on this, and explained that with the new technology, we are able to assist students sooner, rather than the end of the semester. Ruth also shared the difference in rates compared to an athlete verses a

non-athlete. Ruth noted that she could send the BOT discount rate tracking numbers.

- Committee Chair Woods asked to discuss enrollment numbers and projections. Ruth Blankenship and Roger Ott shared that enrollment was right under 1000 and that goals were missed on all targets except early college. Traditional Admissions took the biggest hit from a budgeting perspective. Roger Ott shared more about initiatives and how new marketing and the new CRM, Salesforce, will improve enrollment for both online and trad drastically. Roger also shared the radius of students BU is targeting:
 - about 100 miles. There are 3 categories:
 - Pathway student (45 miles with a 50% scholarship)
 - 45-100 golden circle student
 - Beyond 110-mile radius (organic leads). NICHE, a website students use to find a school, brings us leads. Christian Connector is another website like NICHE, but Christian focused, that brings in leads too

The Committee asked about church affiliations that could help enrollment. Dr. Arnold shared that private schools have been assigned to counseling staff and Dave Pedde, Director of Worship Arts, is managing church partnerships as an outreach with the worship band, but also used for church recruiting.

Roger Ott also shared with the enrollment committee that BU is developing an entire certificate course catalog (focused on Church counseling). This is an on-demand purchase of the course. Cost is low compared to accredited course. This content will be sent out to churches and ministers in January.

Committee Chair Woods asked about COVID regulations and if that has hindered getting to meet with students, like last spring. Dr. Arnold and Scott Polhamus discussed the difficulties, and those regulations can change from school to school. Counselors have attended 19 college fairs in the local region, but the major metro areas are still shut down for visitors.

With no further questions or comments, Mr. Woods closed the meeting in prayer.

Meeting adjourned.



Admissions Board Report

Submitted by Dr. Joshua Arnold, Vice President for Admissions & Student Development; Sherelle Morgan, Interim Associate Vice President for Admissions; Cary Wright, Director of Financial Aid; and Alan Smith, Senior Director for Student Thriving & Success.

Offices of Admissions across the nation continue to face steep challenges recruiting new students in the on-going Covid-19 global pandemic. Dubbed the “Great Interruption,” the decline in straight-from-high school-to-college enrollment and the rise in stop outs—already enrolled students hitting the pause button on their educations—has accelerated since the start of the pandemic. According to the National Student Clearinghouse Research Center, undergraduate enrollment year over year fell by 3.6 percent in fall 2020 and by 3.1 percent in fall 2021. Total undergraduate enrollment declined 6.6 percent from fall 2019 to fall 2021, representing a loss of just over a million students. Low-income students in particular – who make up a significant portion of enrollment at small, high-access private colleges and universities – have been disproportionately impacted by the global pandemic. Over the last two cycles, Free Application for Federal Student Aid submissions have declined significantly. Male enrollments – the majority of traditional enrollment at Bluefield University – also performed poorly in the pandemic years, declining by 10.2 percent between fall 2019 and fall 2021 compared to a 6.8 percent drop for women.

Yet, despite these challenges, year-over-year enrollment for both the traditional and online/graduate programs remained stable. It is disconcerting that the significant dollars invested digital marketing and other online growth initiatives did not yield more enrollment; however, it is reasonable to speculate that these initiatives may well have served as a vital bulwark against further declines. As the global pandemic wanes, Bluefield University will benefit from the new tools, personnel, and processes acquired and refined during this season.

It is with a spirit of urgency and cautious optimism that we share the following reports from our various operating units, including detailed information regarding enrollment for Spring 2022, along with tactics and strategies to impact Fall 2022 and other subsequent sub-terms.

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Traditional Admissions

Submitted by Dr. Joshua Arnold, Vice President for Admissions & Student Development, and Sherelle Morgan, Interim Associate Vice President for Admissions

Context

The Office of Traditional Admissions at Bluefield University supports and advances the mission of the institution by recruiting and admitting a sufficiently large pool of mission-fit students who are academically excellent, talented, and accomplished in athletic and extracurricular endeavors, and broadly diverse, with an aim to matriculate students who will graduate from

Bluefield University, impact their communities, and enhance the reputation of the institution through their accomplishments and service.

The activities of the enrollment teams are family and student-centered, evidence-based, technology-driven, and innovative in spirit as we strive to be best-in-class among our Appalachian college and university peers.

Three-Year Census Report

3-yr Spring Enrollment Totals	New	Returning	Total
2022	81	688	769
2021	75	770	845
2020	86	731	817
3-yr AVG	81	730	810

Traditional	New	Returning	Total
2022	21	382	403
2021	20	418	438
2020	25	403	428

Early College	New	Returning	Total
2022	9	78	87
2021	5	73	78
2020	4	65	69

Online	New	Returning	Total
2022	30	132	162
2021	23	182	205
2020	34	205	239

Graduate	New	Returning	Total
2022	21	96	117
2021	27	97	124
2020	23	58	81

Summary

For the Spring 2022 semester, we enrolled 21 new students, a net gain of one student over the previous year. The efforts of the Traditional Admissions Counselors, and the results they produced this semester, are commendable given the continued challenges they face, including leadership changes, limited travel opportunities, and the on-going development of a new customer relations management platform (CRM). A small incoming fall class meant fewer

enrolled students available to persist through spring, resulting in our smallest overall spring enrollment in the past three years.

Strategies

The Spring/Fall 2022 enrollment cycle was the first to utilize Salesforce as our CRM. Salesforce is the industry leader in client relationship management. Roger Ott, Chip Lambert, Josh Grubb, and Alisha Maloyed served as the primary development team. As with any integration, some hurdles were encountered that may have impeded recruitment efforts. For example, Cloud Call – our computer telephony system – proved ineffective and lacked necessary tools such as voice mail drop and texting. Counselors were eventually transitioned to Fast Call, but not in time to further impact our January start. Significant work has been completed but not fully realized to create a seamless enrollment process for prospective students and an efficient workflow for university staff. Weekly process meetings ensure frequent communication across what would otherwise be disparate business units, helping us to operate as “one enrollment team.”

Counselor territories have been revised based on ten-years of data analyzing feeder high schools, with a greater emphasis on our “golden circles,” or immediate 45 and 75 mile footprints. Previous recruitment strategies relied on extensive travel to large population centers outside of our immediate market (Richmond, NOVA, etc.) While this may have generated significant inquiries in the past, conversions proved abysmally low. Furthermore, those students who did enroll from these areas had lower-than-average retention and persistence rates compared to their peers within our golden circles. A decision was made to shift focus to our local market and develop stronger relationships with feeder high schools. A marketing campaign was developed around our “Pathways” initiative promoting 50% tuition for students within 45 miles of the University. Additionally, a new residential option is now offered to Pathway students that significantly reduces their costs to live on-campus by offering a lower meal plan.

A revamped name purchase strategy was executed this year, prompted in part by the lack of available names from traditional sources such as ACT/SAT. Name sources now include College Board, NRCCUA, Niche, CBSS, and Christian Connector. Perimeters for purchased names have also tightened in respect to geography, grade point average, and faith affiliation to ensure the strongest affinity and missional alignment with Bluefield University. A junior name-buy initiative was also launched, which is expected to significantly bolster our funnel next year. As enrollment behavior has changed, prospective students are increasingly depositing later in the enrollment cycle. An early award campaign was implemented to encourage accepted students to confirm/deposit early. Students who confirm by April 2nd received the highest award amount. We are discussing whether this deposit campaign should be continued with an amount being reduced each month through the end of June to assist counselors in creating a sense of urgency.

A blog was also created with regular content posted to the home page of the website. Each blog post contains key words that are designed to optimize search engine results by featuring recent and relevant content related to the interests of our target market. Additionally, a digital newsletter for communication with sophomore and juniors has been created to help nurture and develop future enrollment funnels.

Projections

The table below outlines our historic conversion rates from inquiry to application, application to accept, accept to confirm, and inquiry to confirm. As you can see, Bluefield University has historically confirmed approximately 7.2% of its total inquiry pool, compared to 6.7% among similarly-sized CCCU peer institutions.

Table 1. Historic Conversion Rates

	2019	2020	2021	BU AVG	CCCU AVG
I --> A	46%	22%	36%	35%	20%
A --> A	50%	99%	72%	74%	91%
A --> C	28%	34%	28%	30%	37%
I --> C	6.4%	7.5%	7.6%	7.2%	6.7%

The table below outlines the total number of inquiries received by February compared to the total number of inquiries for the entire cycle at end of August. Approximately 22.3% of our lead volume comes in between February-August (range 18.6-25.5%).

Table 2. Historic Inquiry Pool

Academic Year	Inquiries	Academic Year	Inquiries
FEB 2022	2966	AUG 2022	3517-3722 EST
FEB 2021	1835	AUG 2021	2304
FEB 2020	3080	AUG 2020	3653
FEB 2019	3242	AUG 2019	3981

Based on these trends, we are projecting to have between 3,517-3,722 estimated inquiries by August. If we convert 7.2% of the total inquiry pool, we are projected to have 253-268 total new students confirmed for Fall 2022. If no further inquiries were to drop into the funnel between now and August, and we were to convert at our worst rate in three years (6.4%), we would likely have 190 confirms. We have 70% more applications compared to this time last year and confirmations have increased nearly 57% over this time last year, strengthening our confidence in the reliability of these projections. Based on these projections, the Traditional Admissions team is pursuing a goal of **255** confirmed students and recommends a budget goal of **225**.

PROJECTED ENROLLMENT RANGE: 253-268
 ADMISSIONS TEAM GOAL: 255
 BUDGET GOAL: 225
 WORST-CASE SCENARIO: 190

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Online & Graduate Admissions

Submitted by Dr. Joshua Arnold, Vice President for Admissions & Student Development, and Sherelle Morgan, Interim Associate Vice President for Admissions

Context

The Office of Online & Graduate Admissions at Bluefield University supports and advances the mission of the institution by recruiting and admitting students seeking quality programs in a flexible online format for the purpose of honing their skills, advancing at work, or increasing their income. The team’s mission is to matriculate students who will graduate from Bluefield

University, contribute to their professions, impact their communities, and enhance the reputation of the institution through their accomplishments and service.

Three-Year Census Report

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2020	23	58	81

Summary

For Spring Term 1 (January), 30 new undergraduate online students, 21 new graduate students, and nine early college students were enrolled. Online undergraduate and early college enrollment experienced gains of seven and four students respectively over the previous year. Graduate programs experienced a decrease of six students compared to last year. 60 total online students were enrolled this January compared to 55 in January 2021.

To date, 30 total online students are registered for the Spring Term 2 (March) start. 20 undergraduates, six graduate, two non-degree, and two Early College are currently registered.

MABS enrollment is on track for Fall 2022; however, we are closely tracking the applicant pool which is smaller (by 29 applications) compared to this time last year. To date, 12 students are confirmed for the seated program (same as this time last year) and one for the online program (compared to none this time last year).

With significant organizational change came technology challenges with the cloud-based phone system and on-going adoption of the Salesforce CRM platform, along with high turnover among the consulting team, remote counselors, and ESS staff. Coupled with the challenges Admissions offices across the nation are facing with the ongoing Covid-19 global pandemic, it is noteworthy that the Online Admissions team was still able to outperform our enrollment numbers from last year. Given the significant dollars spent on acquiring new technology and our sizeable investment in digital marketing, however, it is disconcerting that enrollment was not significantly higher.

Bluefield University had exhausted all of the funding for the Online Growth Task Force in February. Consequently, our business relationship with Roger Ott and his associated companies was discontinued. All enrollment initiatives are now being managed directly by the Executive Leadership Team, including Dr. Joshua Arnold, Vice President for Admissions & Student Development (focused on traditional and online enrollment), Dr. Pat Neely, Executive Vice President for Online & Distance Education (online enrollment), Chip Lambert, Vice President for Operations & Technology (enrollment technology), and Josh Cline, Vice President for Advancement and Marketing (enrollment marketing), as key point leaders. Day-to-day operations are led by Sherelle Morgan, who was recently promoted from Director of Online Admissions to Interim Associate Vice President for Admissions, with responsibilities for both traditional and online recruitment.

Strategies

At the start of the academic year, the Online Growth Task Force, led by Roger Ott and his consulting team, launched several initiatives. These initiatives included implementation of a new CRM platform (Salesforce), the launch of a cloud-based phone system (Cloud Call), partnership with a new digital marketing firm (Cloud Control Media), and organizational changes to the existing staffing model. The goal of these initiatives was to increase online enrollment by optimizing enrollment processes and improving the online student experience. The online enrollment operation has experienced both gains and setbacks since these initiatives were launched last fall.

Salesforce. The introduction of the Salesforce CRM platform has provided benefits such as real-time counselor assignment of new inquiries and applications, automated e-mail campaigns, and a chatter feature which enables enrollment staff to communicate immediate status updates to team members. These features have been instrumental in streamlining counselor outreach, supplementing personal contact with students, and providing a centralized hub of student information across departments. With Salesforce now accessible to Bluefield Central staff, the Registrar's office, and the advising team, workflows are more visible and transparent. On the other hand, the on-going adoption of the Salesforce platform presents challenges that require frequent audits to identify issues, triage, and correct.

Cloud Call. In an effort to improve counselor efficiency and implement a valuable quality assurance tool, the consulting team executed a plan last September to replace voice over IP (VoIP) phones with Cloud Call, a cloud-based telephony service. Cloud-based phone systems that integrate with a CRM offer valuable features and can be accessed from anywhere from any device. Unfortunately, our Cloud Call vendor failed to deliver on basic functionality as well as

the desired features mentioned above. Inbound and outbound calling worked for some but not all on-site team members. None of the remote staff were able to utilize the service. Dropped calls and failed inbound and outbound transfers were frequent, and key features (i.e. click-to-call, mass dialing and texting, and voicemail drop) were not functional.

In early December, the decision was made to scrap Cloud Call, and Google Voice was introduced as an interim solution while the consulting team vetted alternative phone options. Fastcall was implemented in late January and is the phone service currently being used. So far, Fastcall (overall) has performed better than Cloud Call providing the basic functionality and added features needed to enhance counselor efficiency.

Digital marketing. Cloud Control Media (CCM) replaced the EnVeritas Group as Bluefield University's digital marketing partner last Spring. Roger and his team set a goal of 300 enrollments (undergraduate and graduate) for the August and October terms combined. Unfortunately, no significant enrollment gains were made with CCM's marketing strategy over the last year. Their digital campaign did not produce the volume needed to boost the top of the funnel and meet anticipated enrollment goals. So far, the funnel remains relatively flat. To date, 160 online undergraduate, graduate, non-degree, and Early College students have enrolled (this includes students currently registered for Spring Term 2). The residual effect of missed fall enrollment targets has resulted in a budget deficit for the online operation for the fiscal year.

Organizational changes. In an effort to streamline business processes and increase efficiency, the consulting team instituted some organizational changes. Positions affected include Enrollment Support (CRM management and data processing functions) and the online enrollment counselor role. Previously housed in Admissions, Enrollment Support was realigned to fall under the Business Intelligence area of IST, and the online enrollment counselor position was revamped to include full and part-time remote staff.

Enrollment Support staff have historically worked in close proximity with Admissions Counselors, the Advising team, and the Registrar's office. As with any organizational change, the initial transition slowed processes and caused disjointed communication across departments. Additionally, key Enrollment Support staff resigned their positions in December creating a knowledge and experience gap in a mission-critical area.

The remote counselor position was established for three reasons: 1) to target an experienced and qualified talent pool by sourcing candidates outside our geographic area, 2) to manage (anticipated) increased lead generation produced by digital marketing efforts and Salesforce functionality and 3) to provide coverage outside core business hours with part-timers or staff residing in other time zones. Five remote counselors were hired last September/October with a goal of onboarding a total of 10 before the August 2022 start. The five-member remote team consisted of high-caliber hires (three full-time, two part-time), all possessing master's degrees and bringing experience in Admissions, Financial Aid, or Advising. Fully remote work is still uncharted territory for Bluefield University – three of the five remote counselors hired last Fall ultimately resigned. An additional remote counselor was laid off due to lack of funnel volume.

Wins. On a positive note, several bright spots emerged over the last few months. Since the start of the academic year, positive outcomes have included automation of the readmission process, paperless registration (Registrar's office), role-specific Salesforce access across departments, and reporting tools and dashboards offering deeper data insights for decision making.

Projections

The table below outlines enrollment and revenue for each sub term of the 2022-23 academic year based on historical 5-year averages for new enrollment, attrition rates, and graduation rates.

Table 3. 2022-23 Online Enrollment Projections

	Aug-22	Oct-22	Jan-23	Mar-23	May-23	Jun-23	
Undergrad							
New	70	24	34	19	15	10	
New							
Returning	115	185	149	142	64	30	
Graduates	0	0	41	0	49	0	
Net Count	185	209	142	161	30	40	
CredHours	1111	1255	849	963	181	241	
	\$405,588	\$458,148	\$309,955	\$351,565	\$66,166	\$88,066	\$1,679,488
Grad							
New	33	2	25	3	10	3	
New							
Returning	82	115	82	87	58	28	
Graduates	0	0	20	0	40	0	
Net Count	115	117	87	90	28	31	
CredHours	689	701	521	539	170	188	
	\$317,124	\$322,644	\$239,650	\$247,930	\$78,355	\$86,635	\$1,292,339
						TOTAL	\$2,971,827

The majority of our anticipated revenue is captured in August – our largest start date in terms of new student enrollment. Total annual revenue is distributed among our six sub terms as follows:

Table 4. Annual Revenue – Distribution Among Sub Terms

Start Dates	Aug-22	Oct-22	Jan-23	Mar-23	May-23	Jun-23
Undergrad	24%	27%	18%	21%	4%	5%
Graduate	25%	25%	19%	19%	6%	7%

Using the formulas above, one can extrapolate what enrollments would be necessary each sub term to achieve larger revenue goals. Planning is currently underway to determine a realistic cost-per-lead for the Bluefield University context. This metric will largely determine how much must be invested per sub term in conventional and digital marketing efforts to achieve and sustain online enrollment growth.

* * * * *

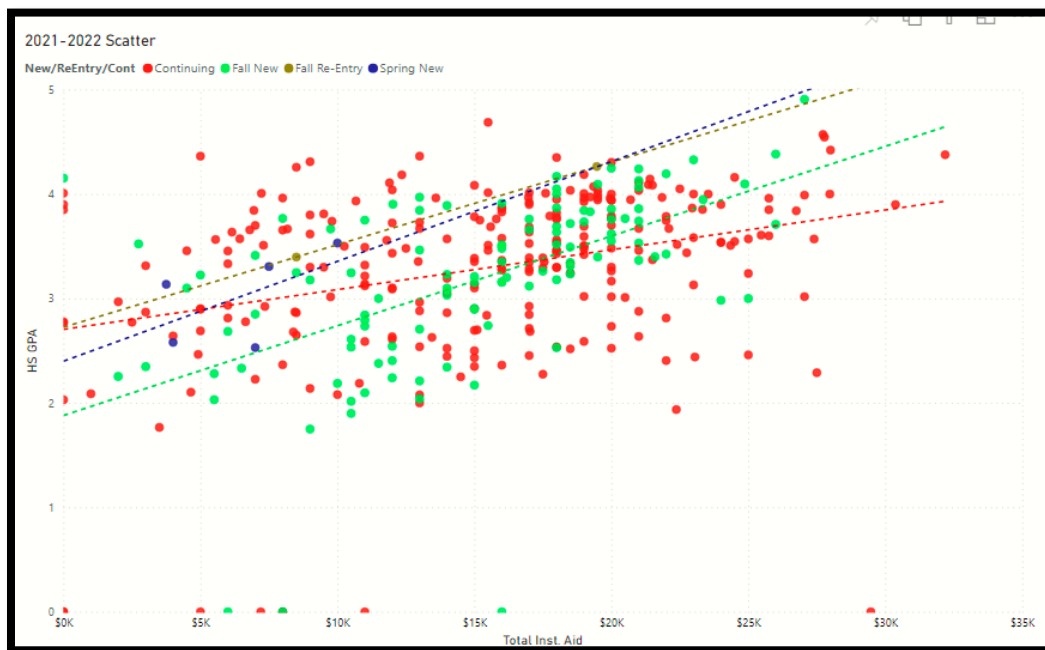
Financial Aid

Submitted by Cary Wright, Director of Financial Aid

The following is an excerpt of the Financial Aid Report most relevant to the enrollment management function of the University. The full Financial Aid report can be found in the Finance Committee Report to the Board of Trustees.

Aid discounts for the 2021-22 academic year landed around 59% for first time freshman, 58% for transfers, and 61% for returning students in the fall of 2021. The newly created Office of Business Intelligence created a Microsoft Power Bi dashboard that provides real time assessment of our discount rate and awarding structure. This allows Bluefield to make accurate, data-driven decisions in regard to our current awarding matrix and future strategies for awarding. In the fall of 2021, leadership members, in conjunction with financial aid, were able to make fast decisions in regard to our awarding matrix and practices for the upcoming 22-23 academic year. This system allowed us to start awarding over three months faster than the previous year, giving us a better competitive advantage. The figure below shows a scatter plot of our awarding for fall 2021 and spring 2022.

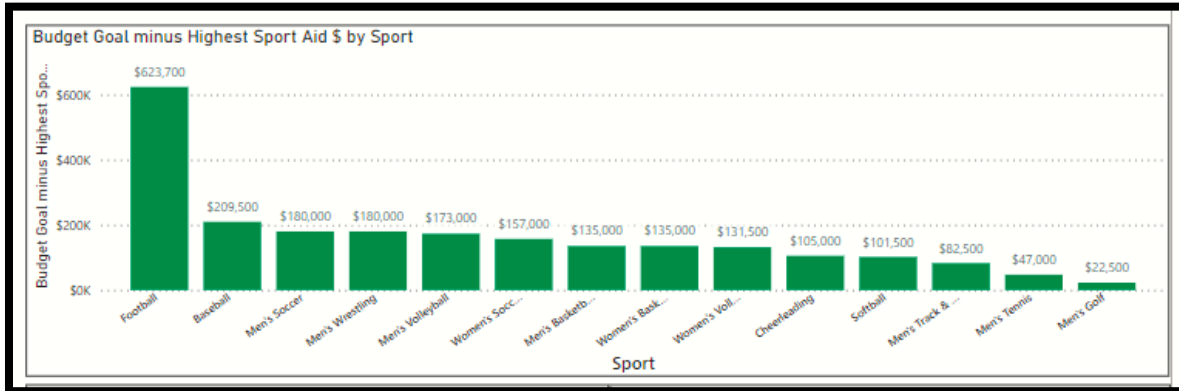
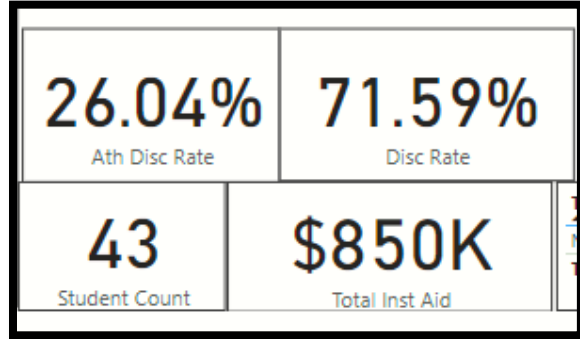
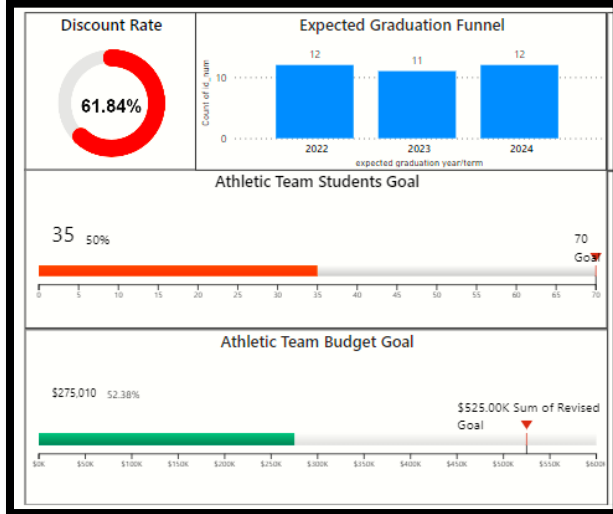
Figure 1. 2021-22 Scatter

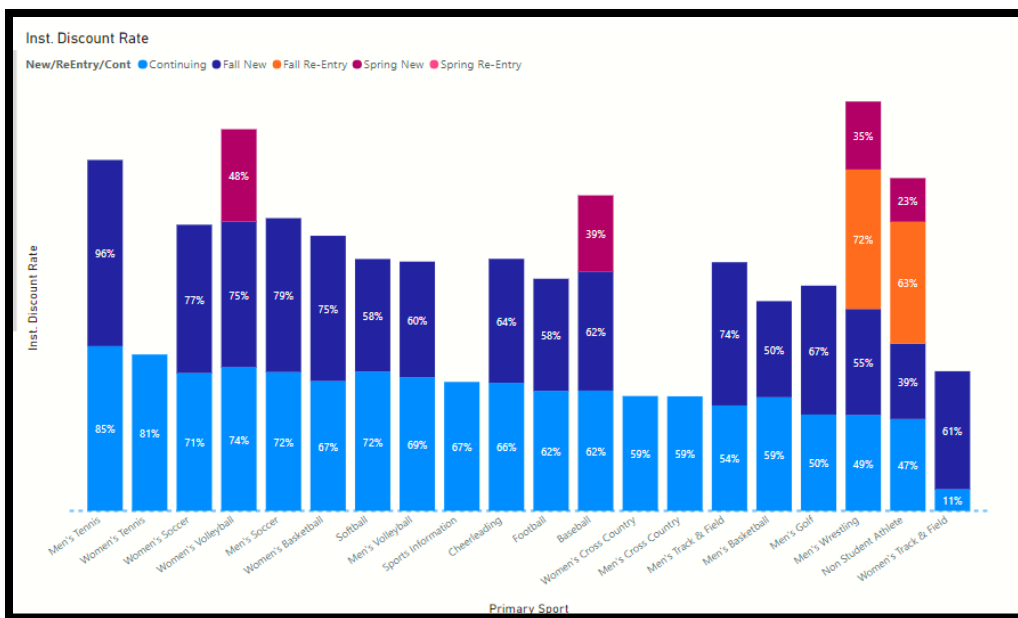
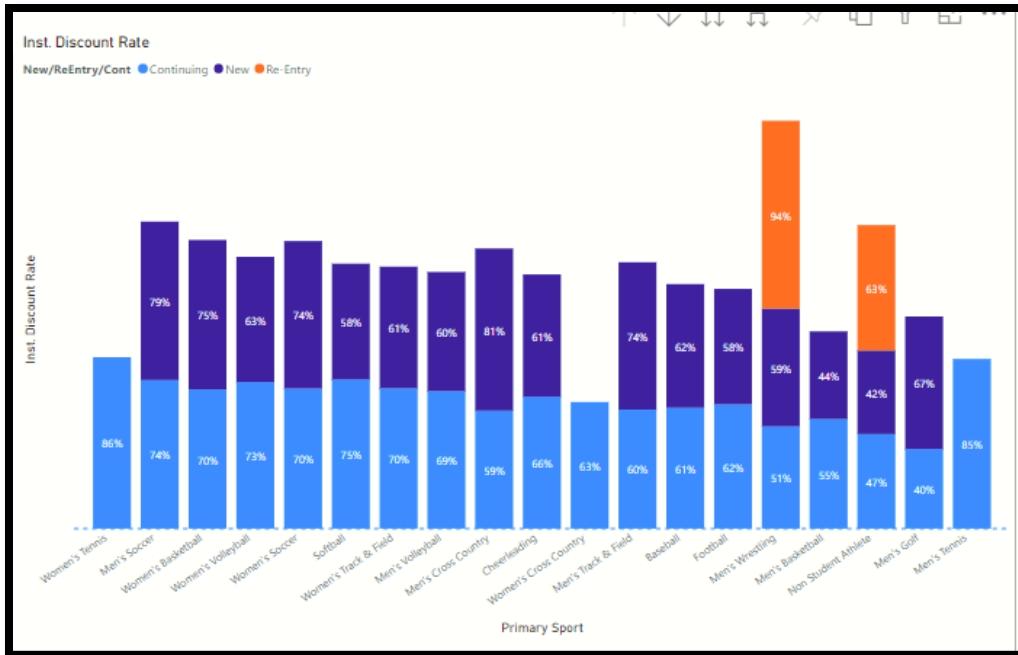


Our awarding strategy has remained consistent with a few modifications. The Bluefield Access scholarship was re-instated to provide need-based assistance to non-athletes along with case-by-case awarding for non-athletes. A large component of our awarding strategy includes the awarding of athletic aid. Leadership approved sixteen full-tuition scholarships for the 2022-23 academic year within three sports: football, women's golf, and women's lacrosse. While these scholarships may inflate our projected discount rate, they will help promote our flagship and new/emerging athletic programs.

To assist with monitoring this area, our data analysts have created a real-time athletic dashboard. Through this system, we have the ability to break awarding down by sport, budget goals and discount rate for awarded, confirmed and returning students.

Figures 2-5. Athletic Dashboard Samples





For our current awarding, we are showing discount rates by class between 68% to 55% discount rate. The chart below illustrates the following:

1. Academic average and total awarded increased across all class levels from year to year as well as in comparison to the previous class level.
2. Discount rate decreased by 5% in freshman from the prior year but also reflect a 32.7% decrease in enrollment from previous year as well as a 67.6% decrease in enrollment from two years ago (spring 2020).
3. We removed our need-based scholarship (BC Access) starting in the 2021-22 award year.

Table 4. Spring Discount Rate Comparison

SPRING 2022				SPRING 2021		
Senior						
Award	#Recipients	Total Awarded	Average Award	#Recipients	Total Awarded	Average Award
Academic	89	\$777,193	\$8,869	92	\$685,583	\$6,067
Fine Arts	14	\$89,500	\$6,393	5	\$35,148	\$4,394
Athletic	58	\$595,847	\$10,273	72	\$751,897	\$8,354
Other	16	\$85,593	\$4,303	17	\$89,612	\$4,716
Need	17	\$63,850	\$3,756	8	\$25,953	\$2,163
Total:	97	\$1,685,527	\$17,377	102	\$1,597,887	\$15,666
Discount		\$2,623,850	64.24%		\$2,626,500	60.84%
Junior						
Award	#Recipients	Total Awarded	Average Award	#Recipients	Total Awarded	Average Award
Academic	91	\$776,247	\$8,530	92	\$680,250	\$7,394
Fine Arts	8	\$56,000	\$7,000	14	\$84,500	\$6,036
Athletic	69	\$629,650	\$9,125	73	\$654,860	\$8,971
Other	18	\$77,045	\$4,280	24	\$94,792	\$3,950
Need	8	\$31,919	\$3,990	12	\$58,919	\$4,910
Total:	95	\$1,570,861	\$16,535	96	\$1,573,321	\$16,389
Discount		\$2,622,000	60%		\$2,472,000	63.65%
Sophomore						
Award	#Recipients	Total Awarded	Average Award	#Recipients	Total Awarded	Average Award
Academic	91	\$914,416	\$10,049	105	\$787,830	\$7,503
Fine Arts	6	\$38,326	\$6,388	9	\$56,000	\$6,222
Athletic	73	\$670,600	\$9,186	79	\$673,300	\$8,523
Other	8	\$52,871	\$6,609	26	\$98,494	\$3,788
Need	4	\$16,783	\$4,196	8	\$35,500	\$4,438
Total:	95	\$1,692,996	\$17,821	95	\$1,651,124	\$17,380
Discount		\$2,570,700	66%		\$2,446,250	67%
Second Year Freshman						
Award	#Recipients	Total Awarded	Average Award	#Recipients	Total Awarded	Average Award
Academic	2	\$20,000	\$10,000	21	\$175,858	\$8,374
Fine Arts	0	\$0	\$0	0	\$0	\$0
Athletic	2	\$14,500	\$7,250	18	\$136,250	\$7,569
Other	0	\$0	\$0	2	\$2,000	\$1,000
Need	0	\$0	\$0	2	\$9,400	\$4,700
Total:	2	\$34,500	\$17,250	20	\$323,508	\$16,175

Discount		\$54,100	63.77%		\$515,000	63%
Freshman						
Award	#Recipients	Total Awarded	Average Award	#Recipients	Total Awarded	Average Award
Academic	79	\$700,725	\$8,870	124	\$1,032,250	\$8,325
Fine Arts	0	\$0	\$0	6	\$33,326	\$5,554
Athletic	74	\$536,000	\$7,243	102	\$782,468	\$7,671
Other	8	\$24,792	\$3,099	11	\$41,056	\$3,732
Need	0	\$0	\$0	10	\$40,950	\$4,095
Total:	80	\$1,261,517	\$15,769	119	\$1,946,770	\$16,359
Discount		\$2,164,800	58%		\$3,064,250	64%

* * * * *

Office of Student Thriving & Success

Submitted by Alan Smith, Senior Director of Student Thriving & Success

Retention Management and Mission

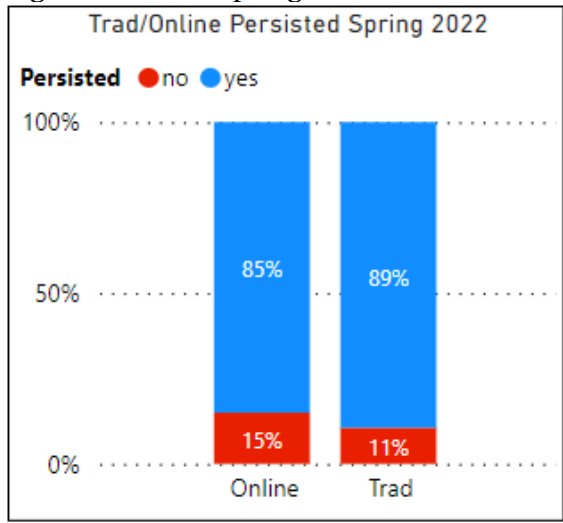
Retention efforts at Bluefield University are managed by the Senior Director of Student Thriving & Success and the Student Success Committee (SSC), which includes representatives from Faculty, the Business Office, the Financial Aid Office, the Registrar’s Office, the Office of Academic Affairs, Admissions, Student Development, Athletics, Online Programing, and the Academic Center for Excellence (ACE). The SSC is chaired by the Senior Director of Student Thriving & Success and meets monthly during the academic year.

The SSC oversees the generation of reports to measure retention and track retention efforts, and a major focus of the SSC and the data it collects is:

- To identify students early each semester who are considered to be at risk of withdrawing from the university or failing to return the next semester due to poor academic performance or for other reasons ranging from financial difficulty to emotional stress, and
- To make contact with these identified students to initiate plans for academic success or to attempt to resolve other issues that may lead to a withdrawal or a failure to return.
- Develop strategies for retaining successful students who may be considering transferring to other institutions, and
- Make recommendations to the College Leadership Team and Executive Leadership Team regarding retention strategies that are developed based upon data collected by the SSC.

Below, you will find charts outlining Persistent and Retention Data.

Figure 6. Fall to Spring 2021 – Persistence Overview



Figures 7-10. Fall to Spring 2021 – TRAD Persistence

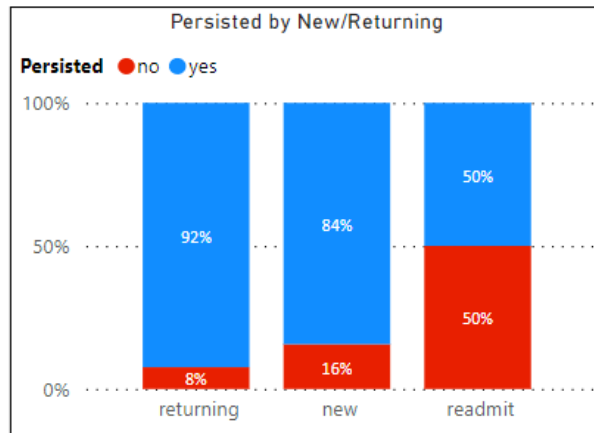
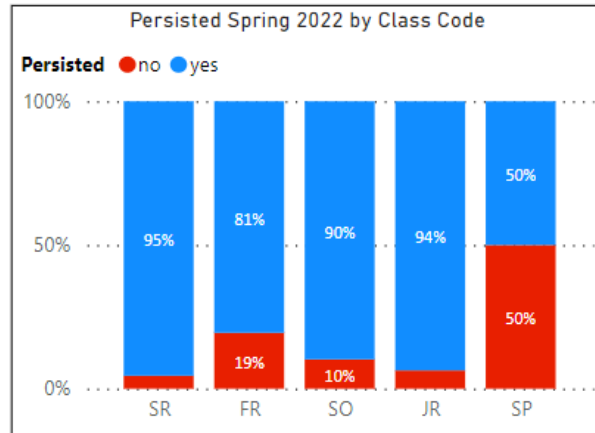
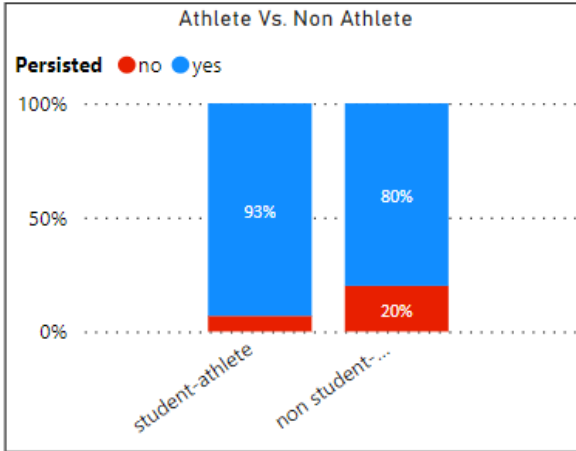
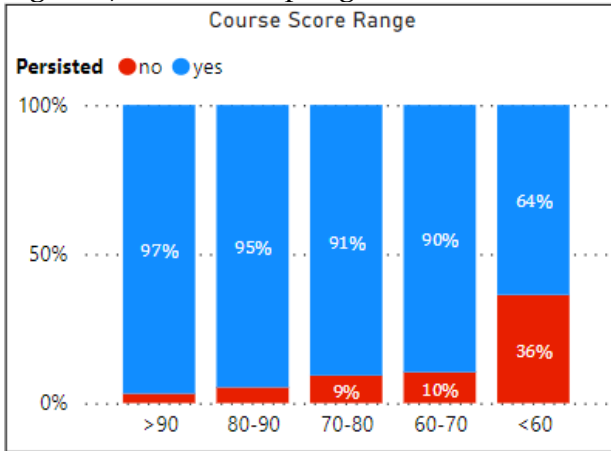


Figure 11. Fall to Spring Traditional Persistence Trends

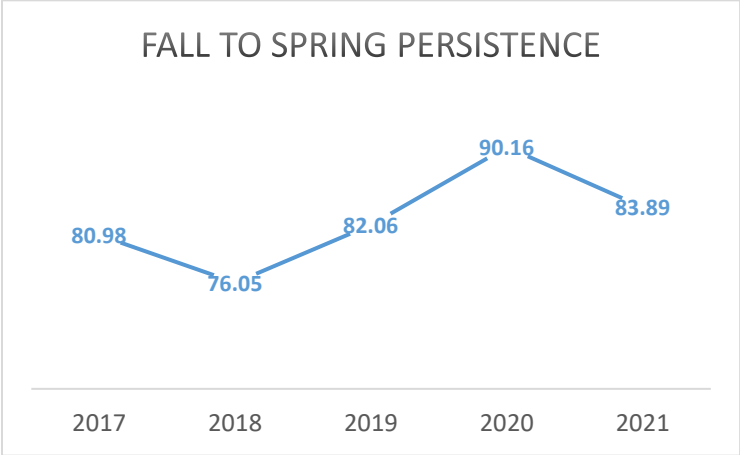
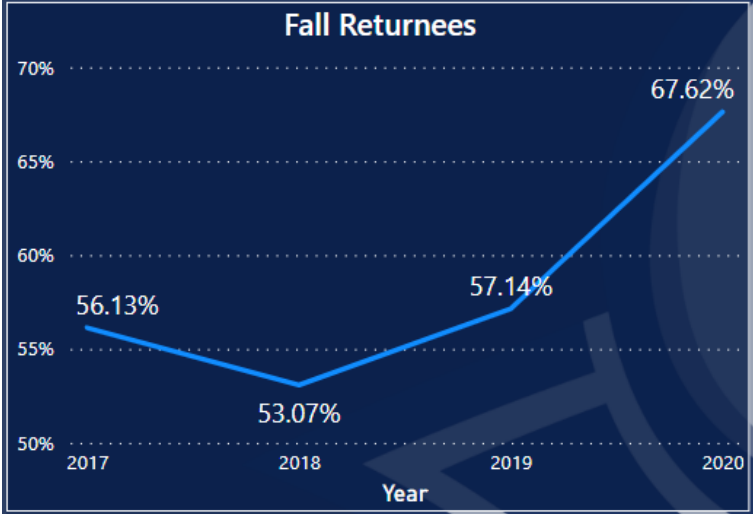
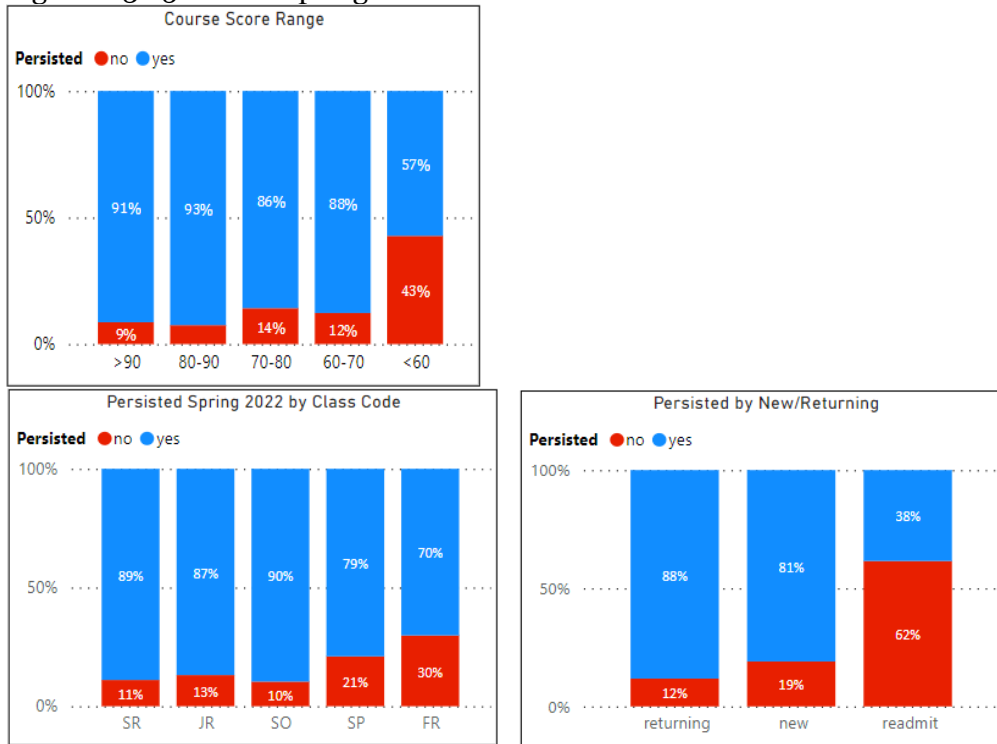


Figure 12. Fall to Fall Retention Trends – Traditional New Student Cohorts



Figures 13-15. Fall to Spring 2021 – ONLINE Persistence



Retention Analysis and Updates

This year we have modified how we measure student success and retention. The Student Success Committee has completed a proposed Retention Plan for the university to adopt. Within the proposal we have identified the following metrics as the vital components to track retention efforts:

- Fall to Spring Persistence
- Fall to Fall Retention
- 6-Year Graduation Data
- Student Surveys
- Student Job Placement Data

As of right now we are tracking the first 3 measurements and will implement an annual student survey and student job placement survey within the next academic year. These modifications help align us with many other schools who track student success as an ongoing effort that continues past a student's graduation.

The Student Success Committee also implemented a new process for supporting a small cohort of students with the lowest chance of persistence. We identified a cohort of students (GPA under 2.25, lives more than 50 miles from campus, has an out-of-pocket balance over \$10,000 per year, and registered for classes within a week before classes starting). This population has a historical retention rate of 2%. This fall the incoming class had 31 students that fit these identifiers. The SSC were paired with 1 or 2 of these students each and provided an additional layer of support for these students. While support is ongoing to help them retain through to the fall, we are excited to report that we were able to return 25 of the 31 students for the spring semester (80.6% persistence)!

The 5-Year Average Fall to Spring persistence rate is 82.62%. Both last year and this year's persistence rates were over our average. Last year it was hypothesized that moving many of the athletic seasons to the Spring impacted the athlete persistence. While this year's persistence rate was not quite as high, it is still an increase over our historical average. There likely isn't any one factor that can be credited for this bump in persistence; however, the following items are believed to have strongly contributed to the increase:

- Football having an exciting, winning season impacts the team culture
- Football has also been investing a lot of time in study tables, allowing ACE staff more time to work with students at-risk of failing courses, resulting in most students either being eligible or on track to become eligible
- Canvas grades being exportable have allowed us easier access to current grades, making the case management in Bluefield Thrives to be timelier and more scalable (73 hours of direct student contact last semester vs 42 hours the previous fall)
- Intervention efforts for students who are not registered for the following term are occurring immediately after the registration period ends, allowing us to help students resolve issues prior to them leaving for break. Additional changes to the procedure this semester will allow us to report outcomes from this intervention in the future
- Student Development reports a significant increase in engagement at campus events, and increases in residence hall satisfaction (4.12/5) and RA satisfaction (4.56/5)
- Students using CARES money to pay their balances may also have contributed to the increase

Dates to Remember:

April 28 - Mud Pig Day

May 20 - Ram Day

June 11 - Ram Day

July 8 - Ram Day